



AUGUST 2024 PERFORMANCE RESULTS

An overview of our three portfolios to date.

Performance to September 03, 2024	YTD	6 Mo	1 Yr	3 Yr**	5 Yr**	10 Yr**	Inception**
Hillside Conservative Growth*	12.81%	6.37%	16.18%	5.47%	6.93%	7.85%	7.85%
HCG Benchmark ¹	6.38%	4.67%	10.37%	1.28%	3.93%	4.25%	4.25%
Hillside Balanced Growth*	14.42%	5.76%	16.58%	6.51%	8.78%	10.03%	10.03%
HBG Benchmark ²	9.62%	5.91%	13.90%	3.34%	6.65%	5.77%	5.77%
Hillside Focused Growth*	18.93%	6.88%	21.84%	9.55%	12.52%	11.08%	11.08%
HFG Benchmark ³	14.55%	7.42%	18.28%	6.81%	11.35%	8.54%	8.54%

Past performance is not an indication of future returns.

* Performance is presented gross of fees. **Inception: Sept 2, 2014. Results beyond 1 year are annualized.

¹ Hillside Conservative Growth Benchmark: 100% Vanguard Conservative ETF

² Hillside Balanced Growth Benchmark: 100% Vanguard Balanced ETF

³ Hillside Focused Growth Benchmark: 100% Vanguard All-Equity ETF

Source: SIACHarts.com

The performance presented in this portfolio report is hypothetical and does not represent a specific client account. Details regarding actual returns of an investment account are available from the client's advisor.

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Performance is calculated using month-end market values of the model portfolio. Since we use a model portfolio to calculate performance there are no client-initiated cash flows (deposits/withdrawals) to account for. Performance is calculated by dividing the change in the model portfolio's market value by the model portfolio's market value at the beginning of the performance period. Also, all income generated by the portfolio's holdings are held within the model portfolio in cash and is accounted for in the portfolio's month-end market value - this results in a total return measure of the model's performance.

Returns for periods less than 1 year are shown as periodic returns while returns for periods greater than 1 year are annualized. Returns do not include fees and actual returns experienced by an investor may differ from those shown. Past performance is not a guarantee of future results.

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