

## Benchmark Returns

Benchmark	Returns as of 12/31/2017		Month End YTD as of 12/31/2017	Average Annual Total Returns as of 12/31/2017			
	1 Month	3 Month		1 Year	3 Year	5 Year	10 Year
Balanced Composite Index	0.80%	3.94%	13.93%	13.93%	7.72%	10.22%	7.26%
BloomBarc 1 Year Municipal Index	0.07%	-0.38%	0.92%	0.92%	0.61%	0.64%	1.48%
BloomBarc 1-15 Year Municipal Index	0.83%	0.15%	4.33%	4.33%	2.37%	2.46%	3.99%
BloomBarc 1-5 Year Municipal Index	0.26%	-0.64%	1.90%	1.90%	1.12%	1.23%	2.56%
BloomBarc CA Municipal Index	1.10%	0.88%	5.63%	5.63%	2.97%	3.36%	4.72%
BloomBarc GA ex-USD FIAdjRIC Cp Hgd	-0.02%	1.15%	2.57%	2.57%	2.93%	—	—
BloomBarc MA Municipal Index	1.03%	0.73%	5.10%	5.10%	2.70%	2.79%	4.36%
BloomBarc Municipal Bond Index	1.05%	0.75%	5.45%	5.45%	2.98%	3.02%	4.46%
BloomBarc Municipal CA Intermed Idx	0.88%	-0.12%	4.40%	4.40%	2.29%	2.60%	4.45%
BloomBarc NJ Municipal Index	1.05%	1.09%	8.17%	8.17%	3.57%	3.36%	4.65%
BloomBarc NY Municipal Index	1.00%	0.67%	5.09%	5.09%	2.95%	3.01%	4.38%
BloomBarc OH Municipal Index	1.03%	0.66%	5.20%	5.20%	3.06%	3.27%	4.19%
BloomBarc PA Municipal Index	1.10%	1.13%	6.02%	6.02%	3.24%	3.31%	4.65%
BloomBarc US 0-5 Year TIPS Index	0.19%	0.21%	0.88%	0.88%	1.22%	0.18%	—
BloomBarc US 1-5 Year Credit Index	0.10%	-0.13%	2.32%	2.32%	1.99%	1.83%	3.49%
BloomBarc US 1-5 Year Treasury Idx	-0.01%	-0.41%	0.68%	0.68%	0.87%	0.73%	2.04%
BloomBarc US 1-5 Yr Corporate Index	0.13%	-0.09%	2.56%	2.56%	2.22%	2.05%	3.75%
BloomBarc US 1-5 Yr Government Idx	-0.01%	-0.40%	0.69%	0.69%	0.88%	0.74%	2.06%

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BloomBarc US 10+ Year Corp Index	2.22%	3.34%	12.09%	12.09%	5.87%	5.31%	7.83%
BloomBarc US 5-10 Year Corp Index	0.51%	0.48%	5.61%	5.61%	4.00%	3.49%	6.00%
BloomBarc US 5-10 Year Credit Index	0.46%	0.44%	5.57%	5.57%	3.81%	3.30%	5.91%
BloomBarc US 5-10 Yr Treasury Index	0.11%	-0.42%	2.17%	2.17%	1.73%	1.32%	4.24%
BloomBarc US Agg Float Adj Index	0.47%	0.41%	3.63%	3.63%	2.27%	2.10%	—
BloomBarc US GNMA Index	0.23%	0.02%	1.86%	1.86%	1.60%	1.70%	3.84%
BloomBarc US Long Treasury Index	1.72%	2.37%	8.53%	8.53%	2.80%	3.48%	6.55%
BloomBarc US LongCredit A/Better Ix	2.08%	3.27%	11.49%	11.49%	5.65%	5.20%	7.38%



BloomBarc US MBS Float Adj Index	0.31%	0.13%	2.37%	2.37%	1.83%	2.00%	—
BloomBarc US Treas Bellwether:1Yr	0.04%	0.04%	0.61%	0.61%	0.59%	0.45%	0.95%
BloomBarc US Trsy Inflat Prtcd Idx	0.92%	1.26%	3.01%	3.01%	2.05%	0.13%	3.53%
BloomBarc USD EmergMkt GovRIC Caplx	0.40%	0.53%	8.46%	8.46%	6.67%	—	—
CA Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Conservative Growth Composite Index	0.83%	2.74%	11.11%	11.11%	5.67%	6.70%	5.42%
Convertibles Composite Index	-0.24%	1.44%	11.76%	11.76%	6.58%	9.66%	6.65%
CRSP US Total Market Index	1.01%	6.34%	21.19%	21.19%	11.09%	15.58%	—
Dividend Growth Spliced Index	1.37%	8.12%	22.29%	22.29%	10.33%	13.80%	7.48%
FTSE All-World ex US Index	2.33%	5.28%	27.11%	27.11%	8.27%	7.19%	2.28%

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FTSE AW ex US High Div Yield Idx	2.51%	3.34%	22.55%	22.55%	6.36%	6.09%	1.75%
FTSE Emerging Index	4.08%	6.97%	32.13%	32.13%	8.11%	4.23%	1.82%
FTSE Global All Cap Index Hdg.	1.39%	5.58%	20.31%	20.31%	10.35%	12.99%	6.09%
FTSE Global Small-Cap ex US Index	3.11%	6.01%	29.95%	29.95%	10.41%	8.76%	3.57%
FTSE High Dividend Yield Index	1.36%	6.31%	16.51%	16.51%	11.01%	15.16%	8.70%
Global Wellesley Income Comp Index	0.87%	2.23%	—	—	—	—	—
Global Wellington Composite Index	1.11%	4.12%	—	—	—	—	—
Growth Composite Index	1.33%	4.88%	19.39%	19.39%	8.69%	10.91%	6.50%
High-Yield Corporate Composite Idx	0.20%	0.36%	6.60%	6.60%	5.62%	5.22%	7.18%
iMoneyNet MFR Treasury Funds Avg	—	—	—	—	—	—	—
Income Composite Index	0.57%	1.68%	7.15%	7.15%	4.10%	4.56%	4.83%
JP Morgan EMBI Global Diversified	0.73%	1.16%	10.26%	10.26%	7.11%	4.58%	7.29%
Managed Payout Composite Index	1.21%	4.00%	15.06%	15.06%	6.71%	7.77%	—
Moderate Growth Composite Index	1.08%	3.81%	15.19%	15.19%	7.20%	8.81%	6.13%
Money Market Funds Average	—	—	—	—	—	—	—
MSCI US Broad Market Index	1.01%	6.35%	21.21%	21.21%	11.15%	15.63%	8.75%
MSCI US Prime Market 750 Index	1.13%	6.64%	21.97%	21.97%	11.31%	15.78%	8.64%
MSCI US Small Cap 1750 Index	0.04%	4.01%	15.16%	15.16%	9.98%	14.44%	9.62%



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NASDAQ Intl Dividend Achievers Sel Ix	1.43%	4.94%	27.64%	27.64%	—	—	—
NASDAQ US Dividend Achievers Select	1.37%	8.12%	22.29%	22.29%	10.33%	13.80%	8.65%
NY Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
REIT Spliced Index	-0.21%	1.41%	5.07%	5.07%	5.37%	9.34%	7.63%
Russell 1000 Growth Index	0.78%	7.86%	30.21%	30.21%	13.79%	17.33%	10.00%
Russell 1000 Index	1.11%	6.59%	21.69%	21.69%	11.23%	15.71%	8.59%
Russell 1000 Value Index	1.46%	5.33%	13.66%	13.66%	8.65%	14.04%	7.10%
Russell 2000 Growth Index	0.12%	4.59%	22.17%	22.17%	10.28%	15.21%	9.19%
Russell 2000 Index	-0.40%	3.34%	14.65%	14.65%	9.96%	14.12%	8.71%
Russell 2000 Value Index	-0.95%	2.05%	7.84%	7.84%	9.55%	13.01%	8.17%
Russell 2500 Growth Index	0.27%	6.35%	24.46%	24.46%	10.88%	15.47%	9.62%
Russell 2500 Value Index	0.40%	4.25%	10.36%	10.36%	9.30%	13.27%	8.82%
Russell 3000 Growth Index	0.73%	7.61%	29.59%	29.59%	13.51%	17.16%	9.93%
Russell 3000 Index	1.00%	6.34%	21.13%	21.13%	11.12%	15.58%	8.60%
Russell 3000 Value Index	1.28%	5.08%	13.19%	13.19%	8.71%	13.95%	7.19%
Russell Midcap Growth Index	0.54%	6.81%	25.27%	25.27%	10.30%	15.30%	9.10%
Russell Midcap Value Index	1.24%	5.50%	13.34%	13.34%	9.00%	14.68%	9.10%
S&P 500 Growth Index	0.58%	6.80%	27.44%	27.44%	12.86%	17.00%	9.99%

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S&P 500 Index	1.11%	6.64%	21.83%	21.83%	11.41%	15.79%	8.50%
S&P 500 Value Index	1.67%	6.33%	15.36%	15.36%	9.47%	14.24%	6.80%
S&P Completion Index	0.52%	4.84%	18.11%	18.11%	9.80%	14.49%	9.17%
S&P EPAC SmallCap Index	2.76%	6.34%	33.47%	33.47%	13.67%	12.65%	5.14%
S&P Global ex U.S. Property Index	3.33%	5.60%	25.86%	25.86%	7.68%	5.93%	—
S&P MidCap 400 Growth Index	-0.14%	7.08%	19.92%	19.92%	11.98%	14.93%	10.35%
S&P MidCap 400 Index	0.22%	6.25%	16.24%	16.24%	11.14%	15.01%	9.97%
S&P MidCap 400 Value Index	0.59%	5.36%	12.32%	12.32%	9.88%	14.83%	9.46%
S&P National AMT-Free Muni Bond Idx	0.98%	0.65%	5.09%	5.09%	2.89%	2.79%	4.22%
S&P SmallCap 600 Growth Index	-0.67%	3.90%	14.79%	14.79%	12.96%	16.39%	10.82%
S&P SmallCap 600 Index	-0.52%	3.96%	13.23%	13.23%	12.00%	15.99%	10.43%



S&P SmallCap 600 Value Index	-0.35%	4.03%	11.51%	11.51%	10.97%	15.52%	9.99%
Spl BloomBarc US 5-10Yr G/Cr FltAdj	0.28%	0.00%	3.81%	3.81%	2.73%	2.29%	5.00%
Spl BloomBarc US Long Treasury Idx	1.70%	2.36%	8.56%	8.56%	2.85%	3.49%	—
Spl BloomBarc US Treas 1-3 Yr Idx	0.01%	-0.27%	0.45%	0.45%	0.63%	0.58%	—
Spl BloomBarc US Treas 3-10 Yr Idx	0.04%	-0.50%	1.59%	1.59%	1.54%	1.23%	—
Spl BloomBarc US1-5YrGov/Cr FlAdjlx	0.03%	-0.30%	1.27%	1.27%	1.27%	1.10%	2.46%
Spl BloomBarc USLongGv/Cr FltAdj lx	1.89%	2.84%	10.72%	10.72%	4.53%	4.43%	7.26%

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Spl Total International Stock Index	2.42%	5.36%	27.41%	27.41%	8.49%	7.39%	1.95%
Spliced BloomBarc USAgg Flt Adjlx	0.47%	0.41%	3.63%	3.63%	2.27%	2.10%	4.03%
Spliced Developed ex US Index	2.03%	4.94%	26.31%	26.31%	8.81%	8.51%	2.23%
Spliced Emerging Markets Index	3.81%	6.70%	31.06%	31.06%	7.42%	3.73%	1.38%
Spliced Energy Index	4.67%	6.81%	6.77%	6.77%	1.97%	0.83%	-1.11%
Spliced Equity Income Index	1.36%	6.31%	16.51%	16.51%	11.01%	15.16%	8.70%
Spliced European Stock Index	1.72%	2.46%	26.83%	26.83%	7.34%	7.89%	1.59%
Spliced Extended Market Index	0.52%	4.84%	18.11%	18.11%	9.80%	14.49%	9.17%
Spliced Glbl Custom Metals & Mining	8.87%	8.36%	26.04%	26.04%	10.41%	-4.61%	-2.41%
Spliced Global Equity Index	1.61%	5.73%	23.97%	23.97%	9.30%	10.80%	4.65%
Spliced Growth Index	0.73%	6.22%	27.86%	27.86%	11.95%	16.14%	9.58%
Spliced Health Care Index	0.14%	1.26%	20.14%	20.14%	5.98%	13.80%	9.08%
Spliced Inst Total Stock Market Idx	1.01%	6.34%	21.19%	21.19%	11.09%	15.58%	8.72%
Spliced International Index	2.24%	5.00%	27.19%	27.19%	7.83%	6.80%	1.23%
Spliced Large Cap Index	1.13%	6.62%	22.07%	22.07%	11.31%	15.74%	8.63%
Spliced Market Neutral Index USD	0.10%	0.28%	0.84%	0.84%	0.37%	0.23%	0.34%
Spliced Mega Cap Growth Index	0.91%	6.59%	29.57%	29.57%	12.71%	16.66%	9.94%
Spliced Mega Cap Index	1.16%	6.81%	22.61%	22.61%	11.69%	15.87%	8.56%

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Spliced Mega Cap Value Index	1.38%	6.99%	16.85%	16.85%	10.82%	15.29%	7.23%
Spliced Mid Cap Growth Idx	-0.04%	5.06%	21.92%	21.92%	8.85%	14.11%	7.79%



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Spliced Mid Cap Index	0.95%	5.65%	19.30%	19.30%	9.42%	15.06%	8.96%
Spliced Mid Cap Value Index	1.81%	6.17%	17.12%	17.12%	9.88%	15.83%	9.93%
Spliced NJ Tax-Ex Money Mkt Fds Avg	—	—	—	—	—	—	—
Spliced PA Tax-Ex Money Mkt Fds Avg	—	—	—	—	—	—	—
Spliced Pacific Stock Index	2.01%	8.88%	28.42%	28.42%	11.28%	9.53%	3.60%
Spliced Small and Mid Cap Index	0.66%	5.64%	18.15%	18.15%	10.25%	15.24%	9.44%
Spliced Small Cap Growth Index	0.28%	5.76%	21.90%	21.90%	9.51%	13.50%	9.26%
Spliced Small Cap Index	0.40%	5.10%	16.24%	16.24%	9.81%	14.43%	9.61%
Spliced Small Cap Value Index	0.50%	4.56%	11.83%	11.83%	10.00%	15.01%	9.76%
Spliced Social Index	1.03%	6.85%	24.33%	24.33%	11.65%	17.25%	8.84%
Spliced Total Stock Market Index	1.01%	6.34%	21.19%	21.19%	11.09%	15.56%	8.71%
Spliced Total World Stock Index	1.69%	5.89%	24.22%	24.22%	9.89%	11.37%	—
Spliced US IMI Consumer Discr 25/50	2.27%	9.08%	22.90%	22.90%	11.76%	17.05%	12.98%
Spliced US IMI Consumer Stapl 25/50	2.01%	6.14%	11.91%	11.91%	8.08%	13.42%	10.15%
Spliced US IMI Energy 25/50	5.23%	6.45%	-2.33%	-2.33%	-0.95%	2.00%	0.72%
Spliced US IMI Financials 25/50	1.45%	7.71%	20.17%	20.17%	14.32%	17.80%	5.10%

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Spliced US IMI Health Care 25/50	-0.59%	1.55%	23.44%	23.44%	8.59%	18.07%	11.64%
Spliced US IMI Industrials 25/50	1.86%	6.49%	21.60%	21.60%	12.20%	16.88%	8.92%
Spliced US IMI Info Tech 25/50	-0.03%	8.58%	37.20%	37.20%	17.97%	20.52%	11.86%
Spliced US IMI Materials 25/50	1.97%	6.69%	23.59%	23.59%	10.54%	12.35%	6.76%
Spliced US IMI Telecom Serv 25/50	0.21%	-0.27%	-5.71%	-5.71%	5.85%	8.93%	4.47%
Spliced US IMI Utilities 25/50	-5.88%	0.63%	12.58%	12.58%	8.02%	13.02%	6.82%
Spliced Value Index	1.48%	6.97%	17.16%	17.16%	10.74%	15.42%	7.67%
STAR Composite Index	0.99%	3.78%	15.24%	15.24%	7.37%	8.96%	6.25%
Target Retirement 2015 Composite Ix	0.85%	2.84%	11.61%	11.61%	5.82%	7.46%	5.29%
Target Retirement 2020 Composite Ix	1.01%	3.52%	14.22%	14.22%	6.83%	8.75%	5.76%
Target Retirement 2025 Composite Ix	1.12%	4.01%	16.08%	16.08%	7.51%	9.61%	5.95%
Target Retirement 2030 Composite Ix	1.22%	4.41%	17.66%	17.66%	8.06%	10.40%	6.08%
Target Retirement 2035 Composite Ix	1.31%	4.81%	19.25%	19.25%	8.61%	11.18%	6.33%
Target Retirement 2040 Composite Ix	1.41%	5.22%	20.86%	20.86%	9.16%	11.80%	6.64%



Target Retirement 2045 Composite Ix	1.45%	5.42%	21.55%	21.55%	9.41%	11.96%	6.72%
Target Retirement 2050 Composite Ix	1.45%	5.42%	21.55%	21.55%	9.41%	11.96%	6.72%
Target Retirement 2055 Composite Ix	1.45%	5.42%	21.55%	21.55%	9.41%	11.96%	—
Target Retirement 2060 Composite Ix	1.45%	5.42%	21.55%	21.55%	9.41%	11.96%	—

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Target Retirement 2065 Composite Ix	1.45%	5.42%	—	—	—	—	—
Target Retirement Income Compos. Ix	0.68%	2.14%	8.68%	8.68%	4.66%	5.15%	4.99%
Tax-Exempt Money Mkt Funds Average	—	—	—	—	—	—	—
Tax-Managed Balanced Compos. Index	0.98%	3.33%	12.75%	12.75%	6.93%	9.09%	6.86%
US Gov't Money Market Funds Average	—	—	—	—	—	—	—
Wellesley Income Composite Index	—	—	—	—	—	—	—
Wellington Composite Index	0.98%	4.61%	15.76%	15.76%	8.62%	11.24%	7.46%

Index performance is provided as a benchmark. It is not illustrative of any particular investment. An investment cannot be made in an index. Data obtained from Vanguard.com.