

## Benchmark Returns

Benchmark	Returns as of 03/31/2018		Month End YTD as of 03/31/2018	Average Annual Total Returns as of 03/31/2018			
	1 Month	3 Month		1 Year	3 Year	5 Year	10 Year
Balanced Composite Index	-0.90%	-0.84%	-0.84%	8.83%	6.78%	8.66%	7.71%
BloomBarc 1 Year Municipal Index	-0.07%	0.38%	0.38%	0.61%	0.66%	0.66%	1.34%
BloomBarc 1-15 Year Municipal Index	0.22%	-0.91%	-0.91%	1.81%	1.78%	2.20%	3.80%
BloomBarc 1-5 Year Municipal Index	-0.06%	-0.05%	-0.05%	0.53%	0.94%	1.10%	2.35%
BloomBarc CA Municipal Index	0.45%	-1.07%	-1.07%	2.88%	2.23%	3.07%	4.71%
BloomBarc GA ex-USD FIAdjRIC Cp Hgd	1.09%	0.98%	0.98%	3.56%	2.51%	3.81%	—
BloomBarc MA Municipal Index	0.46%	-1.19%	-1.19%	2.26%	1.98%	2.57%	4.25%
BloomBarc Municipal Bond Index	0.37%	-1.11%	-1.11%	2.66%	2.25%	2.73%	4.40%
BloomBarc Municipal CA Intermed Idx	0.24%	-1.07%	-1.07%	1.45%	1.57%	2.27%	4.24%
BloomBarc NJ Municipal Index	0.41%	-1.02%	-1.02%	5.16%	3.13%	3.08%	4.56%
BloomBarc NY Municipal Index	0.29%	-1.20%	-1.20%	2.31%	2.19%	2.73%	4.28%
BloomBarc OH Municipal Index	0.34%	-1.09%	-1.09%	2.44%	2.29%	3.01%	4.17%
BloomBarc PA Municipal Index	0.45%	-1.22%	-1.22%	3.01%	2.48%	3.01%	4.56%
BloomBarc US 0-5 Year TIPS Index	0.53%	0.21%	0.21%	0.39%	1.16%	0.14%	—
BloomBarc US 1-5 Year Credit Index	0.08%	-0.71%	-0.71%	0.70%	1.36%	1.57%	3.24%
BloomBarc US 1-5 Year Treasury Idx	0.33%	-0.40%	-0.40%	-0.11%	0.44%	0.62%	1.62%
BloomBarc US 1-5 Yr Corporate Index	0.04%	-0.80%	-0.80%	0.80%	1.53%	1.76%	3.52%
BloomBarc US 1-5 Yr Government Idx	0.32%	-0.39%	-0.39%	-0.09%	0.46%	0.63%	1.66%

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BloomBarc US 10+ Year Corp Index	0.67%	-4.05%	-4.05%	6.11%	3.30%	4.83%	7.68%
BloomBarc US 5-10 Year Corp Index	0.09%	-2.37%	-2.37%	1.65%	2.26%	2.89%	5.73%
BloomBarc US 5-10 Year Credit Index	0.16%	-2.29%	-2.29%	1.64%	2.11%	2.75%	5.58%
BloomBarc US 5-10 Yr Treasury Index	1.00%	-1.51%	-1.51%	-0.25%	0.46%	0.99%	3.46%
BloomBarc US Agg Float Adj Index	0.64%	-1.48%	-1.48%	1.24%	1.20%	1.82%	—
BloomBarc US GNMA Index	0.65%	-1.27%	-1.27%	0.28%	0.92%	1.48%	3.46%
BloomBarc US Long Treasury Index	3.03%	-3.29%	-3.29%	3.51%	0.35%	3.29%	5.78%



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BloomBarc US LongCredit A/Better Ix	0.98%	-4.19%	-4.19%	5.60%	3.08%	4.64%	7.06%
BloomBarc US MBS Float Adj Index	0.61%	-1.16%	-1.16%	0.72%	1.09%	1.76%	—
BloomBarc US Treas Bellwether:1Yr	0.21%	0.38%	0.38%	0.90%	0.69%	0.51%	0.77%
BloomBarc US Trsy Inflat Prtcd Idx	1.05%	-0.79%	-0.79%	0.92%	1.30%	0.05%	2.93%
BloomBarc USD EmergMkt GovRIC Caplx	0.19%	-1.55%	-1.55%	3.14%	5.29%	—	—
CA Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Conservative Growth Composite Index	-0.28%	-0.70%	-0.70%	7.12%	4.70%	5.84%	5.62%
Convertibles Composite Index	0.22%	1.92%	1.92%	9.11%	5.79%	8.74%	7.47%
CRSP US Total Market Index	-1.98%	-0.60%	-0.60%	13.87%	10.21%	13.04%	—
Dividend Growth Spliced Index	-1.37%	-0.47%	-0.47%	14.63%	10.18%	11.38%	8.51%
FTSE All-World ex US Index	-1.75%	-1.19%	-1.19%	16.45%	6.53%	6.30%	3.13%

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FTSE AW ex US High Div Yield Idx	-1.88%	-1.39%	-1.39%	12.78%	5.45%	5.15%	2.65%
FTSE Emerging Index	-2.74%	1.44%	1.44%	21.63%	7.95%	4.86%	3.07%
FTSE Global All Cap Index Hdq.	-1.95%	-1.64%	-1.64%	12.03%	7.95%	10.81%	7.25%
FTSE Global Small-Cap ex US Index	-1.02%	-0.73%	-0.73%	19.07%	9.00%	7.55%	4.40%
FTSE High Dividend Yield Index	-2.14%	-2.81%	-2.81%	9.56%	10.06%	11.95%	9.21%
Global Wellesley Income Comp Index	—	—	—	—	—	—	—
Global Wellington Composite Index	-1.19%	-1.05%	-1.05%	—	—	—	—
Growth Composite Index	-1.35%	-0.74%	-0.74%	12.41%	7.60%	9.27%	7.20%
High-Yield Corporate Composite Idx	-0.49%	-1.06%	-1.06%	3.24%	4.36%	4.52%	7.25%
iMoneyNet MFR Treasury Funds Avg	—	—	—	—	—	—	—
Income Composite Index	0.25%	-0.71%	-0.71%	4.51%	3.19%	4.08%	4.78%
JP Morgan EMBI Global Diversified	0.29%	-1.74%	-1.74%	4.30%	5.78%	4.69%	7.04%
Managed Payout Composite Index	-0.89%	-0.71%	-0.71%	9.79%	5.82%	6.57%	—
Moderate Growth Composite Index	-0.81%	-0.71%	-0.71%	9.75%	6.17%	7.57%	6.58%
Money Market Funds Average	—	—	—	—	—	—	—
MSCI US Broad Market Index	-1.99%	-0.61%	-0.61%	13.82%	10.25%	13.10%	9.77%
MSCI US Prime Market 750 Index	-2.33%	-0.61%	-0.61%	14.15%	10.54%	13.30%	9.66%
MSCI US Small Cap 1750 Index	1.01%	-0.67%	-0.67%	10.85%	8.12%	11.56%	10.61%



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NASDAQ Intl Dividend Achievers Sel Ix	-1.05%	-3.33%	-3.33%	13.52%	—	—	—
NASDAQ US Dividend Achievers Select	-1.37%	-0.47%	-0.47%	14.63%	10.18%	11.38%	9.13%
NY Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Real Estate Spliced Index	—	—	—	—	—	—	—
Russell 1000 Growth Index	-2.74%	1.42%	1.42%	21.25%	12.90%	15.53%	11.34%
Russell 1000 Index	-2.27%	-0.69%	-0.69%	13.98%	10.39%	13.17%	9.61%
Russell 1000 Value Index	-1.76%	-2.83%	-2.83%	6.95%	7.88%	10.78%	7.78%
Russell 2000 Growth Index	1.35%	2.30%	2.30%	18.63%	8.77%	12.90%	10.95%
Russell 2000 Index	—	—	—	—	—	—	—
Russell 2000 Value Index	1.24%	-2.64%	-2.64%	5.13%	7.87%	9.96%	8.61%
Russell 2500 Growth Index	0.82%	2.38%	2.38%	19.92%	9.11%	13.37%	11.17%
Russell 2500 Value Index	1.10%	-2.65%	-2.65%	5.72%	7.26%	9.88%	9.34%
Russell 3000 Growth Index	-2.44%	1.48%	1.48%	21.06%	12.57%	15.32%	11.31%
Russell 3000 Index	-2.01%	-0.64%	-0.64%	13.81%	10.22%	13.03%	9.62%
Russell 3000 Value Index	-1.54%	-2.82%	-2.82%	6.81%	7.87%	10.71%	7.84%
Russell Midcap Growth Index	-0.16%	2.17%	2.17%	19.74%	9.17%	13.31%	10.61%
Russell Midcap Value Index	0.25%	-2.50%	-2.50%	6.50%	7.23%	11.11%	9.81%
S&P 500 Growth Index	-2.98%	1.93%	1.93%	19.69%	12.66%	15.37%	11.35%

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S&P 500 Index	-2.54%	-0.76%	-0.76%	13.99%	10.78%	13.31%	9.49%
S&P 500 Value Index	-2.04%	-3.57%	-3.57%	7.69%	8.40%	10.87%	7.42%
S&P Completion Index	0.70%	0.12%	0.12%	13.09%	7.97%	11.77%	10.29%
S&P EPAC SmallCap Index	-1.38%	-0.30%	-0.30%	23.16%	11.55%	10.97%	5.86%
S&P Global ex U.S. Property Index	1.09%	-0.29%	-0.29%	18.05%	6.15%	4.75%	—
S&P MidCap 400 Growth Index	1.02%	1.35%	1.35%	15.66%	9.78%	12.63%	11.55%
S&P MidCap 400 Index	0.93%	-0.77%	-0.77%	10.97%	8.96%	11.97%	10.90%
S&P MidCap 400 Value Index	0.84%	-3.01%	-3.01%	6.12%	7.76%	11.02%	10.12%
S&P National AMT-Free Muni Bond Idx	0.34%	-1.16%	-1.16%	2.56%	2.17%	2.48%	4.22%
S&P SmallCap 600 Growth Index	2.56%	2.42%	2.42%	14.78%	11.46%	14.34%	12.07%



S&P SmallCap 600 Index	2.04%	0.57%	0.57%	12.68%	10.76%	13.56%	11.35%
S&P SmallCap 600 Value Index	1.49%	-1.32%	-1.32%	10.50%	10.01%	12.69%	10.58%
Spl BloomBarc US 5-10Yr G/Cr FltAdj	0.60%	-1.88%	-1.88%	0.67%	1.26%	1.86%	4.48%
Spl BloomBarc US Long Treasury Idx	3.03%	-3.29%	-3.29%	3.48%	0.43%	3.28%	—
Spl BloomBarc US Treas 1-3 Yr Idx	0.20%	-0.16%	-0.16%	0.01%	0.40%	0.52%	—
Spl BloomBarc US Treas 3-10 Yr Idx	0.76%	-1.14%	-1.14%	-0.28%	0.51%	0.96%	—
Spl BloomBarc US1-5YrGov/Cr FIAdjlx	0.24%	-0.50%	-0.50%	0.19%	0.78%	0.95%	2.12%
Spl BloomBarc USLongGv/Cr FltAdj lx	1.65%	-3.58%	-3.58%	5.09%	2.13%	4.09%	6.79%

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Spl Total International Stock Index	-1.67%	-1.14%	-1.14%	16.73%	6.78%	6.39%	2.84%
Spliced BloomBarc USAgg Flt Adjlx	0.64%	-1.48%	-1.48%	1.24%	1.20%	1.82%	3.65%
Spliced Developed ex US Index	-1.43%	-1.78%	-1.78%	15.62%	6.39%	7.04%	3.00%
Spliced Emerging Markets Index	-2.43%	1.29%	1.29%	20.58%	7.21%	4.38%	2.70%
Spliced Energy Index	0.69%	-3.80%	-3.80%	6.88%	1.80%	-0.66%	-0.75%
Spliced Equity Income Index	-2.14%	-2.81%	-2.81%	9.56%	10.06%	11.95%	9.21%
Spliced European Stock Index	-1.11%	-1.81%	-1.81%	15.79%	5.47%	6.93%	2.32%
Spliced Extended Market Index	0.70%	0.12%	0.12%	13.09%	7.97%	11.77%	10.29%
Spliced Glbl Custom Metals & Mining	-1.78%	-5.36%	-5.36%	10.64%	9.63%	-2.85%	-3.02%
Spliced Global Equity Index	-2.21%	-1.03%	-1.03%	14.76%	8.09%	9.19%	5.57%
Spliced Growth Index	-2.50%	1.20%	1.20%	18.03%	11.13%	14.37%	10.86%
Spliced Health Care Index	-2.01%	-0.99%	-0.99%	9.77%	2.87%	10.64%	10.31%
Spliced Inst Total Stock Market Idx	-1.98%	-0.60%	-0.60%	13.87%	10.21%	13.04%	9.74%
Spliced International Index	-1.91%	-1.33%	-1.33%	16.35%	6.13%	5.86%	2.04%
Spliced Large Cap Index	-2.50%	-0.67%	-0.67%	14.18%	10.58%	13.25%	9.64%
Spliced Market Neutral Index USD	—	—	—	—	—	—	—
Spliced Mega Cap Growth Index	-3.16%	1.16%	1.16%	18.87%	12.09%	15.00%	11.16%
Spliced Mega Cap Index	-2.96%	-0.81%	-0.81%	14.53%	11.12%	13.43%	9.53%

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Spliced Mega Cap Value Index	-2.82%	-2.54%	-2.54%	10.75%	10.25%	12.16%	7.98%



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Spliced Mid Cap Growth Idx	0.10%	1.64%	1.64%	15.67%	7.31%	11.85%	9.46%
Spliced Mid Cap Index	-0.10%	0.03%	0.03%	12.36%	7.90%	12.31%	10.18%
Spliced Mid Cap Value Index	-0.27%	-1.36%	-1.36%	9.58%	8.45%	12.45%	10.70%
Spliced NJ Tax-Ex Money Mkt Fds Avg	—	—	—	—	—	—	—
Spliced PA Tax-Ex Money Mkt Fds Avg	—	—	—	—	—	—	—
Spliced Pacific Stock Index	-1.97%	-0.46%	-0.46%	18.27%	8.45%	7.42%	4.60%
Spliced Small and Mid Cap Index	0.52%	0.03%	0.03%	12.91%	8.59%	12.44%	10.60%
Spliced Small Cap Growth Index	1.51%	2.09%	2.09%	17.38%	8.06%	11.34%	10.86%
Spliced Small Cap Index	1.13%	-0.22%	-0.22%	11.80%	8.03%	11.65%	10.65%
Spliced Small Cap Value Index	0.80%	-2.09%	-2.09%	7.37%	7.98%	11.70%	10.28%
Spliced Social Index	-2.69%	-0.71%	-0.71%	15.18%	10.74%	14.46%	10.15%
Spliced Total Stock Market Index	-1.98%	-0.60%	-0.60%	13.87%	10.21%	13.03%	9.74%
Spliced Total World Stock Index	-1.87%	-0.86%	-0.86%	15.25%	8.61%	9.74%	—
Spliced US IMI Consumer Discr 25/50	-2.30%	1.98%	1.98%	16.02%	10.74%	14.93%	14.14%
Spliced US IMI Consumer Stapl 25/50	-0.67%	-6.40%	-6.40%	-0.83%	5.18%	8.92%	9.71%
Spliced US IMI Energy 25/50	2.03%	-5.95%	-5.95%	-1.33%	-2.23%	-1.29%	0.76%
Spliced US IMI Financials 25/50	-3.31%	-0.52%	-0.52%	16.88%	14.36%	15.03%	6.43%

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Spliced US IMI Health Care 25/50	-2.57%	-0.28%	-0.28%	12.80%	5.80%	14.62%	12.97%
Spliced US IMI Industrials 25/50	-1.97%	-1.82%	-1.82%	14.41%	11.34%	13.81%	9.32%
Spliced US IMI Info Tech 25/50	-3.32%	4.13%	4.13%	27.61%	18.93%	20.23%	14.19%
Spliced US IMI Materials 25/50	-3.67%	-5.35%	-5.35%	10.08%	8.14%	9.99%	6.54%
Spliced US IMI Telecom Serv 25/50	-2.84%	-7.28%	-7.28%	-8.63%	2.55%	6.03%	5.35%
Spliced US IMI Utilities 25/50	4.04%	-3.35%	-3.35%	2.50%	8.50%	9.44%	7.55%
Spliced Value Index	-2.51%	-2.29%	-2.29%	10.84%	10.09%	12.26%	8.44%
STAR Composite Index	-1.02%	-0.85%	-0.85%	9.51%	6.34%	7.64%	6.71%
Target Retirement 2015 Composite Ix	-0.36%	-0.59%	-0.59%	7.40%	4.90%	6.36%	5.80%
Target Retirement 2020 Composite Ix	-0.68%	-0.66%	-0.66%	9.10%	5.82%	7.46%	6.36%
Target Retirement 2025 Composite Ix	-0.90%	-0.71%	-0.71%	10.29%	6.46%	8.16%	6.64%
Target Retirement 2030 Composite Ix	-1.10%	-0.72%	-0.72%	11.28%	6.99%	8.80%	6.87%
Target Retirement 2035 Composite Ix	-1.31%	-0.74%	-0.74%	12.28%	7.52%	9.43%	7.18%



Target Retirement 2040 Composite Ix	-1.51%	-0.75%	-0.75%	13.29%	8.04%	9.96%	7.49%
Target Retirement 2045 Composite Ix	-1.62%	-0.76%	-0.76%	13.75%	8.29%	10.11%	7.56%
Target Retirement 2050 Composite Ix	-1.62%	-0.76%	-0.76%	13.75%	8.29%	10.11%	7.56%
Target Retirement 2055 Composite Ix	-1.62%	-0.76%	-0.76%	13.75%	8.29%	10.11%	—
Target Retirement 2060 Composite Ix	-1.62%	-0.76%	-0.76%	13.75%	8.29%	10.11%	—

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Target Retirement 2065 Composite Ix	-1.62%	-0.76%	-0.76%	12.12%	—	—	—
Target Retirement Income Compos. Ix	-0.06%	-0.54%	-0.54%	5.54%	3.85%	4.53%	5.02%
Tax-Exempt Money Mkt Funds Average	—	—	—	—	—	—	—
Tax-Managed Balanced Compos. Index	-0.99%	-0.69%	-0.69%	7.90%	6.23%	7.77%	7.26%
US Gov't Money Market Funds Average	—	—	—	—	—	—	—
Wellesley Income Composite Index	—	—	—	—	—	—	—
Wellington Composite Index	-1.51%	-1.17%	-1.17%	9.72%	7.69%	9.53%	7.98%

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