



Investment Objective and Strategy

The 3D/Dimensional 100 Portfolio is designed for aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds or Dimensional sub-advised funds to target 100% exposure to equities by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a benchmark consisting of the MSCI All-Country World Index ("ACWI"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability.

Investor Profile

Designed for investors with the highest risk tolerance who want to maximize their return potential and can handle high short-term account volatility and have an investment time horizon over ten years.

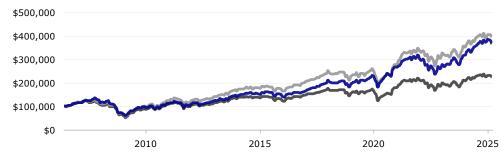
Risk Rating: Aggressive Allocation



Portfolio Performance¹

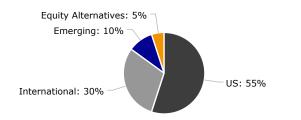
	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 100 (Net)	0.67%	0.67%	1.39%	2.50%	12.95%	4.85%	4.45%
Dimensional 100 (Gross)	1.42%	1.42%	4.45%	5.61%	16.35%	8.02%	7.62%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	8.84%	7.17%

Growth of \$100,000²



Dimensional 100 (Net) Dimensional 100 (Gross) MSCI ACWI Net USD

Asset Allocation



Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Dimensional 100 (Net)	Dimensional 100 (Gross)	MSCI ACWI Net USD
2025	0.67	1.42	-1.30
2024	6.99	10.21	17.49
2023	13.30	16.71	22.20
2022	-15.21	-12.59	-18.36
2021	21.79	25.44	18.54
2020	3.69	6.85	16.24
2019	19.59	23.17	26.60
2018	-14.98	-12.35	-9.41
2017	16.51	20.01	23.97
2016	12.29	15.67	7.86
2015	-5.70	-2.82	-2.36

Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.





DIMENSIONAL 100

As of 03/31/2025

17.01%

0.34

2.27%

21584

0.31%

N/A

N/A

Portfolio Holdings*

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
Index Performance						
DFA International Real Estate Sec I		US Fund G	lobal Real Es	state	DFITX	351
DFA Real Estate Securities I		US Fund R	eal Estate	DFREX	140	
DFA Emerging Markets Small Cap I		US Fund D	iversified En	nerging Mkts	DEMS	K 4514
DFA Emerging Markets Value I		US Fund D	iversified En	nerging Mkts	DFEVX	3545
DFA Emerging Markets I		US Fund D	Fund Diversified Emerging Mkts			X 2259
DFA International Small Cap Value I		US Fund Fo	oreign Small/	/Mid Value	DISVX	1831
DFA International Small Company I		US Fund Fo	oreign Small/	DFISX	4059	
DFA International Value I		US Fund Fo	oreign Large	DFIVX	518	
Dimensional International High Pbly E	ETF	US Fund Fo	oreign Large	DIHP	466	
DFA US Micro Cap I		US Fund Sr	nall Blend		DFSCX	1697
DFA US Small Cap Value I		US Fund Sr	nall Value		DFSVX	1032
JHancock Multifactor Mid Cap ETF		US Fund M	id-Cap Blen	d	JHMM	669
DFA US Large Cap Value I		US Fund La	arge Value		DFLVX	334
Dimensional US High Profitability ETF	F	Large Cap	Blend		DUHP	172
Name		Asset Class	5		Symbo	l Holdings
_						

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

Weighted Average Fund Expense Weighted Average Credit Rating

Portfolio Characteristics³

Standard Deviation

Number of Securities

Effective Duration

Sharpe Ratio

Portfolio Yield

Sector Breakdown

Financials	16.97%
Information Technology	15.06%
Industrials	13.45%
Consumer Discretionary	10.74%
Health Care	9.84%
Materials	8.03%
Energy	7.53%
Real Estate	6.53%
Consumer Staples	6.33%
Communication Services	3.92%
Utilities	1.61%
Other	0.00%

Credit Rating

No data filled

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D/Dimensional 100 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 100 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 100% equity exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

3Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher riskadjusted return and is generally favorable.

*Portfolio Holdings information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor. Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.



DIMENSIONAL 100 TAX-SENSITIVE

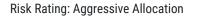
As of 03/31/2025

Investment Objective and Strategy

The 3D/Dimensional 100 Tax-Sensitive Portfolio is designed for aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Tax-Aware Dimensional funds (where available), Dimensional Funds or Dimensional sub-advised funds to target 100% exposure to equities by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a benchmark consisting of the MSCI All-Country World Index ("ACWI"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability.

Investor Profile

Designed for investors with the highest risk tolerance who want to maximize their return potential and can handle high short-term account volatility and have an investment time horizon over ten years.

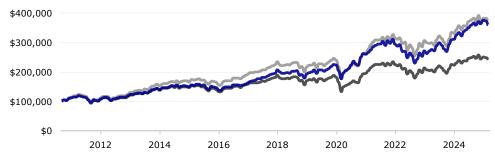




Portfolio Performance¹

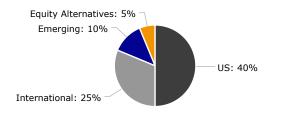
	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 100 TS (Net)	-0.30%	-0.30%	1.62%	2.54%	12.69%	4.86%	6.26%
Dimensional 100 TS (Gross)	0.44%	0.44%	4.69%	5.65%	16.08%	8.03%	9.48%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	8.84%	9.18%

Growth of \$100,000²



Dimensional 100 TS (Net) Dimensional 100 TS (Gross) MSCI ACWI Net USD

Asset Allocation



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Benefits

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About Freedom

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Annual Returns¹

	Dimensional 100 TS (Net)	Dimensional 100 TS (Gross)	MSCI ACWI Net USD
2025	-0.30	0.44	-1.30
2024	7.68	10.91	17.49
2023	14.16	17.59	22.20
2022	-15.66	-13.05	-18.36
2021	20.96	24.59	18.54
2020	3.64	6.80	16.24
2019	19.93	23.53	26.60
2018	-13.83	-11.17	-9.41
2017	15.89	19.37	23.97
2016	11.28	14.64	7.86
2015	-5.52	-2.63	-2.36





DIMENSIONAL 100 TAX-SENSITIVE

Portfolio Characteristics³

As of 03/31/2025

Portfolio Holdings*

Name	Asset Class	Symbol	Holdings	Standard Deviation	15.02%
Dimensional US High Profitability ETF	Large Cap Blend	DUHP	172	Sharpe Ratio	0.48
- ,	-			Portfolio Yield	2.24%
Dimensional US Marketwide Value ETF	US Fund Large Value	DFUV	1311	Number of Securities	17017
JHancock Multifactor Mid Cap ETF	US Fund Mid-Cap Blend	JHMM	669	Effective Duration	N/A
DFA US Micro Cap I	US Fund Small Blend	DFSCX	1697	Weighted Average Fund Expense	0.31%
Dimensional International High Pbly ETF	US Fund Foreign Large Growth	DIHP	466	Weighted Average Credit Rating	N/A
Dimensional International Value ETF	US Fund Foreign Large Value	DFIV	520	Sector Breakdown	
DFA International Small Company I	US Fund Foreign Small/Mid Blend	DFISX	4059	Financials	17.30%
DFA International Small Cap Value I	US Fund Foreign Small/Mid Value	DISVX	1831	Information Technology	15.39%
	Ū.			Industrials	13.68%
DFA Emerging Markets I	US Fund Diversified Emerging Mkts	DFEMX	2259	Consumer Discretionary	10.26%
DFA Emerging Markets Value I	US Fund Diversified Emerging Mkts	DFEVX	3545	Health Care	9.66%
DFA Real Estate Securities I	US Fund Real Estate	DFREX	140	Materials	7.65%
DFA International Real Estate Sec I	US Fund Global Real Estate	DFITX	351	Energy	7.34%
	oo rund Globar Kear Estate	DITIX	001	Real Estate	6.54%
Index Performance				Consumer Staples	6.24%

3 mo YTD 1 Year 3 Year 5 Year 5 Yr. Std Dev S&P 500 TR -4.27% -4.27% 8.28% 9.07% 18.60% 16.76% -9.79% -9.79% Russell 2000 -5.37% -0.97% 11.76% 22.24% MSCI ACWI Net USD -1.30% -1.30% 7.18% 6.92% 15,18% 15.70% MSCI EAFE 6.87% 4.88% 16.03% 6.87% 6.05% 11.77% **MSCI Emerging Markets** 2.40% 2.40% 5.56% -1.20% 5.35% 16.49% Bloomberg US Agg. Bond 2.78% 2.78% 4.89% 0.33% -0.51% 6.34%

	1,01,
Effective Duration	N/A
Weighted Average Fund Expense	0.31%
Weighted Average Credit Rating	N/A
Sector Breakdown	
Financials	17.30%
Information Technology	15.39%
Industrials	13.68%
Consumer Discretionary	10.26%
Health Care	9.66%
Materials	7.65%
Energy	7.34%
Real Estate	6.54%
Consumer Staples	6.24%
Communication Services	4.33%
Utilities	1.61%
Other	0.00%

Credit Rating

No data filled

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¹Performance The 3D/Dimensional 100 Tax-Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 100 Tax-Sensitive Portfolio Strategy which uses Tax-Aware Dimensional Funds (where available), Dimensional Funds or Dimensional Sub-Advised Funds to target 100% equity exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher riskadjusted return and is generally favorable.

*Portfolio Holdings information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor. Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





Investment Objective and Strategy

The 3D/Dimensional 20 Portfolio is designed for conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 20% / 80% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 20% MSCI All-Country World Index ("ACWI") and 80% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a conservative risk tolerance who seek to experience lower account volatility with an investment time horizon of less than five years.

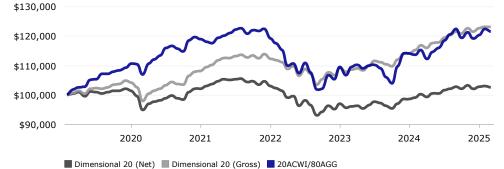
Risk Rating: Conservative Allocation



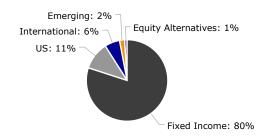
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 20 (Net)	0.59%	0.59%	2.29%	0.39%	1.58%	-	0.41%
Dimensional 20 (Gross)	1.34%	1.34%	5.37%	3.44%	4.66%	-	3.46%
20ACWI/80AGG	1.98%	1.98%	5.38%	1.72%	2.59%	-	3.24%

Growth of \$100,000²



Asset Allocation



Benefits

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Annual Returns¹

	Dimensional 20 (Net)	Dimensional 20 (Gross)	20ACWI/80AGG
2025	0.59	1.34	1.98
2024	3.40	6.51	4.36
2023	3.69	6.84	8.26
2022	-9.04	-6.25	-13.94
2021	2.37	5.48	2.27
2020	-0.04	3.00	9.72
2019	2.13	4.71	9.08

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 20

As of 03/31/2025

4.62%

0.11

3.47%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

0.00%

1.60%

5.36 0.21%

Portfolio Characteristics³

CCC

Others

Name		Asset Clas	c			Symbol	Holdings	Standard Deviation
						,	0	Sharpe Ratio
Dimensional US High Profitability E	IF	Large Cap	Blend			DUHP	172	Portfolio Yield
DFA US Large Cap Value I		US Fund La	arge Value			DFLVX	334	Number of Securities
JHancock Multifactor Mid Cap ETF		US Fund №	1id-Cap Blen	d		JHMM	669	Effective Duration
DFA US Small Cap Value I		US Fund S	mall Value			DFSVX	1032	Weighted Average Fund Expense
DFA US Micro Cap I		US Fund Si	mall Blend			DFSCX	1697	Weighted Average Credit Rating
Dimensional International High Pbly	/ ETF	US Fund Fe	oreign Large	Growth		DIHP	466	Sector Breakdown
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			0					Consumer Discretionary
DFA Emerging Markets I		US Fund D	iversified En	nerging Mkts		DFEMX	2259	Health Care
DFA Emerging Markets Value I		US Fund D	iversified En	nerging Mkts		DFEVX	3545	Materials
DFA Emerging Markets Small Cap I		US Fund D	iversified En	nerging Mkts		DEMSX	4514	Energy
DFA Real Estate Securities I		US Fund R	eal Estate			DFREX	140	Real Estate
DFA International Real Estate Sec I		LIS Eurod G	lobal Real Es	tate		DFITX	351	Consumer Staples Communication Services
DFA Investment Grade I		US Fund Ir	ntermediate	Core Bond		DFAPX	865	Utilities
DFA Five-Year Global Fixed-Income	I	US Fund W	/orld Bond-U	JSD Hedged		DFGBX	336	Other
DFA Intermediate Govt Fixed-Incon	ne l	US Fund Ir	ntermediate	Government		DFIGX	112	Credit Rating
								AAA 81.78 %
Index Performance								BBB 16.62 %
	3 mo	YTD	1 Year	3 Year	5 Ye		Yr. Std Dev	BB 0.00 %
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60	0%	16.76%	B 0.00 %

S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

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¹Performance The 3D/Dimensional 20 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 20 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 20% equity exposure and 80% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$200.000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor.





Investment Objective and Strategy

The 3D/Dimensional 30 Portfolio is designed for conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 30% / 70% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 30% MSCI All-Country World Index ("ACWI") and 70% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a conservative risk tolerance who seek to experience lower account volatility with an investment time horizon of less than five years.

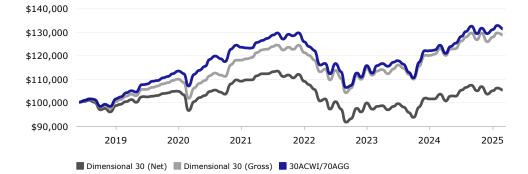
Risk Rating: Conservative Allocation



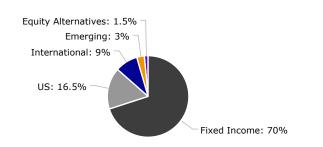
Portfolio Performance¹

Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
1.47%	1.47%	1.66%	-0.11%	1.73%	-	0.76%
2.22%	2.22%	4.73%	2.92%	4.81%	-	3.82%
1.57%	1.57%	5.62%	2.41%	4.14%	-	4.11%
	1.47% 2.22%	1.47%1.47%2.22%2.22%	1.47% 1.47% 1.66% 2.22% 2.22% 4.73%	1.47% 1.47% 1.66% -0.11% 2.22% 2.22% 4.73% 2.92%	1.47% 1.47% 1.66% -0.11% 1.73% 2.22% 2.22% 4.73% 2.92% 4.81%	1.47% 1.47% 1.66% -0.11% 1.73% - 2.22% 2.22% 4.73% 2.92% 4.81% -

Growth of \$100,000²



Asset Allocation



Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Dimensional 30 (Net)	Dimensional 30 (Gross)	30ACWI/70AGG
2025	1.47	2.22	1.57
2024	1.82	4.89	5.94
2023	6.14	9.35	9.95
2022	-14.38	-11.74	-14.43
2021	2.27	5.37	4.22
2020	4.65	7.83	10.75
2019	9.09	12.38	14.05
2018	-4.02	-2.56	-1.53

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 30

As of 03/31/2025

7.54%

0.14

3.32%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

0.00%

1.60%

5.36 0.22%

Portfolio Characteristics³

CCC

Others

•										
Name		Asset Clas	s		S	iymbol	Holdings	Standard Deviation		
Dimensional US High Profitability E	TF	Large Cap Blend				OUHP	172	Sharpe Ratio Portfolio Yield		
DFA US Large Cap Value I		US Fund La	arge Value		D	OFLVX	334	Number of Securities		
JHancock Multifactor Mid Cap ETF		US Fund №	1id-Cap Bler	nd	IL	НММ	669	Effective Duration		
DFA US Small Cap Value I		US Fund S	mall Value		D	DFSVX	1032	Weighted Average Fund Expense		
DFA US Micro Cap I		US Fund Si				DFSCX	1697	Weighted Average Credit Rating		
				Cusudh			466	Sector Breakdown		
Dimensional International High Pbl	YEIF	US Fund Fo	oreign Large	Growth	L	DIHP	400			
DFA International Value I		US Fund Fo	oreign Large	e Value	D	DFIVX	518	Financials		
DFA International Small Company I		US Fund Foreign Small/Mid Blend				DFISX	4059	Information Technology		
DFA International Small Cap Value		US Fund Foreign Small/Mid Value				DISVX	1831	Industrials		
	1							Consumer Discretionary		
DFA Emerging Markets I		US Fund Diversified Emerging Mkts				OFEMX	2259	Health Care		
DFA Emerging Markets Value I		US Fund Diversified Emerging Mkts			s D	DFEVX	3545	Materials		
DFA Emerging Markets Small Cap I		US Fund D	viversified Er	merging Mkt	s D	DEMSX	4514	Energy		
DFA Real Estate Securities I		US Fund R	eal Estate		D	OFREX	140	Real Estate Consumer Staples		
DFA International Real Estate Sec I		US Fund G	ilobal Real E	state	D	OFITX	351	Communication Services		
DFA Investment Grade I		US Fund Ir	ntermediate	Core Bond	D	OFAPX	865	Utilities		
DFA Five-Year Global Fixed-Income	• I	US Fund W	Vorld Bond-	USD Hedged	D	OFGBX	336	Other		
DFA Intermediate Govt Fixed-Incor	me l			Government		DFIGX	112	Credit Rating		
								AAA	81.78%	
Index Performance								BBB	16.62 %	
	3 mo	YTD	1 Year	3 Year	5 Year	5	Yr. Std Dev	BB	0.00 %	
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	6	16.76%	В	0.00 %	
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	6	22.24%	B	0.00 %	

Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D/Dimensional 30 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 30 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 30% equity exposure and 70% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$200.000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

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*Portfolio Holdings information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor.



DIMENSIONAL 40 TAX-SENSITIVE

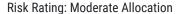
As of 03/31/2025

Investment Objective and Strategy

The 3D/Dimensional 40 Tax-Sensitive Portfolio is designed for moderately conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 40% / 60% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 40% MSCI All-Country World Index ("ACWI") and 60% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a low-to-moderate risk tolerance who can handle some short-term account volatility and have an investment time horizon of at least three years.

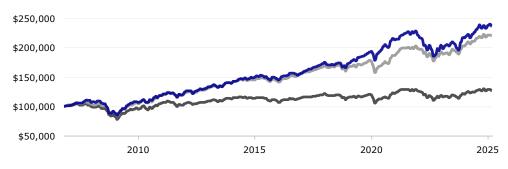




Portfolio Performance¹

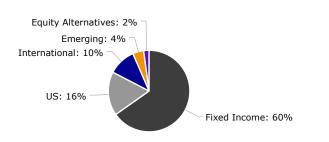
	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 40 TS (Net)	0.29%	0.29%	1.63%	0.72%	3.76%	1.02%	1.30%
Dimensional 40 TS (Gross)	1.04%	1.04%	4.70%	3.78%	6.90%	4.09%	4.38%
40ACWI/60AGG	1.17%	1.17%	5.86%	3.08%	5.71%	4.56%	4.79%

Growth of \$100,000²



Dimensional 40 TS (Net) Dimensional 40 TS (Gross) 40ACWI/60AGG

Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

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Annual Returns¹

	Dimensional 40 TS (Net)	Dimensional 40 TS (Gross)	40ACWI/60AGG
2025	0.29	1.04	1.17
2024	3.92	7.05	7.54
2023	5.96	9.16	11.66
2022	-10.94	-8.20	-14.94
2021	5.38	8.57	6.19
2020	1.56	4.65	11.72
2019	8.32	11.60	15.84
2018	-7.25	-4.41	-3.63
2017	5.50	8.70	11.33
2016	3.71	6.85	4.88
2015	-3.71	-0.78	-0.35





DIMENSIONAL 40 TAX-SENSITIVE

Portfolio Characteristics³

As of 03/31/2025

Portfolio Holdings*

r or trono rioluliga							i ortiono onaracterístics		
Name		Asset Class	S		Symbol	Holdings	Standard Deviation		7.12%
Dimensional US High Profitability ET	F	Large Cap	Blend		DUHP	172	Sharpe Ratio		0.22
Dimensional US Marketwide Value E		US Fund La			DFUV	1311	Portfolio Yield		2.84%
			0				Number of Securities		18848
JHancock Multifactor Mid Cap ETF		US Fund M	lid-Cap Bler	ld	JHMM	669	Effective Duration		4.10
DFA US Micro Cap I		US Fund Sr	mall Blend		DFSCX	1697	Weighted Average Fund Expense		0.24%
Dimensional International High Pbly	ETF	US Fund Fo	oreign Large	Growth	DIHP	466	Weighted Average Credit Rating		Aa2/AA-
Dimensional International Value ETF		US Fund Fo	oreign Large	Value	DFIV	520	Sector Breakdown		
DFA International Small Company I		US Fund Fo	oreign Small	/Mid Blend	DFISX	4059	Financials		17.30%
DFA International Small Cap Value I		US Fund Fo	oreign Small	/Mid Value	DISVX	1831	Information Technology		15.39%
•			•				Industrials		13.68%
DFA Emerging Markets I				nerging Mkts			Consumer Discretionary		10.26%
DFA Emerging Markets Value I		US Fund D	iversified Er	nerging Mkts	DFEVX	3545	Health Care		9.66%
DFA Real Estate Securities I		US Fund Re	eal Estate		DFREX	140	Materials		7.65%
DFA International Real Estate Sec I		US Fund G	lobal Real E	state	DFITX	351	Energy		7.34%
DFA Investment Grade I		US Fund In	termediate	Core Bond	DFAPX	865	Real Estate		6.54%
							Consumer Staples		6.24%
DFA Five-Year Global Fixed-Income I				JSD Hedged	DFGBX		Communication Services		4.33%
DFA Intermediate-Term Municipal Bo	ll	US Fund M	luni Nationa	l Interm	DFTIX	630	Utilities		1.61%
Index Performance							Other		0.00%
index renominance	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	Credit Rating		
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%	AAA	82.77%	
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%	BBB	10.49 %	
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%	BB	0.37 %	
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%	В	0.00 %	
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%	CCC	0.00 %	
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%	Others	6.37 %	

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¹Performance The 3D/Dimensional 40 Tax-Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 40 Tax-Sensitive Portfolio Strategy which uses Tax-Aware Dimensional Funds (where available), Dimensional Funds or Dimensional Sub-Advised Funds to target 40% equity exposure and 60% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$200,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

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Investment Objective and Strategy

The 3D/Dimensional 40 Portfolio is designed for moderately conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 40% / 60% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 40% MSCI All-Country World Index ("ACWI") and 60% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

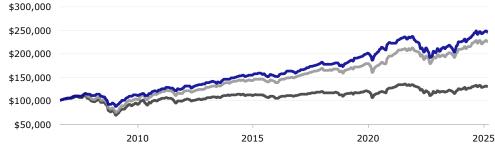
Designed for investors with a low-to-moderate risk tolerance who can handle some short-term account volatility and have an investment time horizon of at least three years.



Portfolio Performance¹

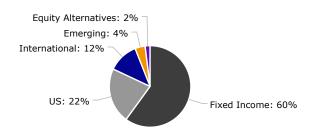
	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 40 (Net)	1.35%	1.35%	1.60%	0.46%	3.95%	1.45%	1.41%
Dimensional 40 (Gross)	2.10%	2.10%	4.66%	3.51%	7.10%	4.53%	4.49%
40ACWI/60AGG	1.17%	1.17%	5.86%	3.08%	5.71%	4.56%	4.95%

Growth of \$100,000²



Dimensional 40 (Net) Dimensional 40 (Gross) 40ACWI/60AGG

Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

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Annual Returns¹

	Dimensional 40 (Net)	40ACWI/60AGG			
2025	1.35	2.10	1.17		
2024	2.43	5.52	7.54		
2023	6.99	10.23	11.66		
2022	-13.04	-10.37	-14.94		
2021	5.72	8.92	6.19		
2020	5.55	8.74	11.72		
2019	9.73	13.05	15.84		
2018	-7.43	-4.59	-3.63		
2017	6.43	9.65	11.33		
2016	3.77	6.91	4.88		
2015	-3.99	-1.06	-0.35		





DIMENSIONAL 40

As of 03/31/2025

8.76%

0.20

3.17%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

0.00%

1.60%

5.36 0.24%

Portfolio Characteristics³

								Standard Deviation
Name		Asset Clas	S		5	Symbol	Holdings	Sharpe Ratio
Dimensional US High Profitability E1	F	Large Cap	Blend		[DUHP	172	Portfolio Yield
DFA US Large Cap Value I		US Fund L	arge Value		[DFLVX	334	Number of Securities
JHancock Multifactor Mid Cap ETF		US Fund №	1id-Cap Blen	ıd	J	JHMM	669	Effective Duration
DFA US Small Cap Value I		US Fund S	mall Value		[DFSVX	1032	Weighted Average Fund Expense
DFA US Micro Cap I		US Fund S	mall Blend		[DFSCX	1697	Weighted Average Credit Rating
Dimensional International High Pbly	ETF	US Fund F	oreign Large	Growth	[DIHP	466	Sector Breakdown
DFA International Value I		US Fund F	oreign Large	Value	[DFIVX	518	Financials
DFA International Small Company I		US Fund F	oreign Small	/Mid Blend	[DFISX	4059	Information Technology
DFA International Small Cap Value I		US Fund F	oreign Small	/Mid Value	[DISVX	1831	Industrials Consumer Discretionary
DFA Emerging Markets I		US Fund D	viversified En	nerging Mkts	; [DFEMX	2259	Health Care
DFA Emerging Markets Value I		US Fund D	viversified En	nerging Mkts	; [DFEVX	3545	Materials
DFA Emerging Markets Small Cap I		US Fund D	viversified En	nerging Mkts	; [DEMSX	4514	Energy
DFA Real Estate Securities I		US Fund R	eal Estate		[DFREX	140	Real Estate Consumer Staples
DFA International Real Estate Sec I		US Fund G	ilobal Real Es	state	[DFITX	351	Communication Services
DFA Investment Grade I		US Fund Ir	ntermediate	Core Bond	[DFAPX	865	Utilities
DFA Five-Year Global Fixed-Income		US Fund V	Vorld Bond-U	JSD Hedged	[DFGBX	336	Other
DFA Intermediate Govt Fixed-Incom	el			Government		DFIGX	112	Credit Rating
		oo rana n			-			AAA 81.78%
Index Performance								BBB 16.62 %
	3 mo	YTD	1 Year	3 Year	5 Year	r 5	Yr. Std Dev	BB 0.00 %
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	%	16.76%	B 0.00 %

MSCI Emerging Markets	2.40%
Bloomberg US Agg. Bond	2.78%

-9.79%

-1.30%

6.87%

-9.79%

-1.30%

6.87%

2.40%

2.78%

-5.37%

7.18%

4.88%

5.56%

4.89%

-0.97%

6.92%

6.05%

-1.20%

0.33%

Disclaimer

Russell 2000

MSCI EAFE

MSCI ACWI Net USD

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11.76%

15.18%

11.77%

5.35%

-0.51%

22.24%

15.70%

16.03%

16.49%

6.34%

CCC

Others

¹Performance The 3D/Dimensional 40 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 40 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 40% equity exposure and 60% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$200.000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor.



DIMENSIONAL 50 TAX-SENSITIVE

As of 03/31/2025

Investment Objective and Strategy

The 3D/Dimensional 50 Tax-Sensitive Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 50% / 50% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 50% MSCI All-Country World Index ("ACWI") and 50% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least five years.

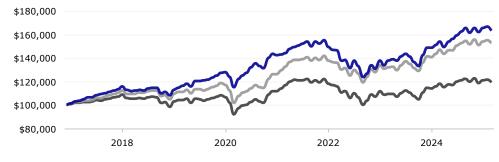




Portfolio Performance¹

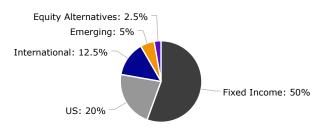
	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 50 TS (Net)	0.66%	0.66%	0.95%	0.97%	5.30%	-	2.18%
Dimensional 50 TS (Gross)	1.41%	1.41%	4.00%	4.03%	8.48%	-	5.28%
50ACWI/50AGG	0.76%	0.76%	6.09%	3.74%	7.27%	-	6.13%

Growth of \$100,000²



Dimensional 50 TS (Net) Dimensional 50 TS (Gross) 50ACWI/50AGG

Asset Allocation



Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

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Annual Returns¹

	Dimensional 50 TS (Net)	Dimensional 50 TS (Gross)	50ACWI/50AGG
2025	0.66	1.41	0.76
2024	3.44	6.56	9.15
2023	7.27	10.51	13.38
2022	-12.25	-9.55	-15.47
2021	9.06	12.36	8.18
2020	3.03	6.16	12.64
2019	10.04	13.36	17.63
2018	-7.94	-5.12	-4.56
2017	7.14	10.38	13.35

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 50 TAX-SENSITIVE

Portfolio Characteristics³

As of 03/31/2025

Portfolio Holdings*

Name	Asset Class	Symbol Holdings	Standard Deviation	8.94%
Dimensional US High Profitability ETF	F Large Cap Blend	DUHP 172	Sharpe Ratio	0.29
Dimensional US Marketwide Value ET	TF US Fund Large Value	DFUV 1311	Portfolio Yield	2.84%
JHancock Multifactor Mid Cap ETF	US Fund Mid-Cap Blend	JHMM 669	Number of Securities	18848
DFA US Micro Cap I	US Fund Small Blend	DFSCX 1697	Effective Duration	4.10
Dimensional International High Pbly E	ETF US Fund Foreign Large Growth	DIHP 466	Weighted Average Fund Expense	0.25%
Dimensional International Value ETF		DFIV 520	Weighted Average Credit Rating	Aa2/AA-
DFA International Small Company I	US Fund Foreign Small/Mid Blend	DFISX 4059	Sector Breakdown	
DFA International Small Cap Value I	US Fund Foreign Small/Mid Value	DISVX 1831	Financials	17.30%
DFA Emerging Markets I	US Fund Diversified Emerging Mkts	DFEMX 2259	Information Technology	15.39%
DFA Emerging Markets Value I	US Fund Diversified Emerging Mkts	DFEVX 3545	Industrials	13.68%
DFA Real Estate Securities I	US Fund Real Estate	DFREX 140	Consumer Discretionary	10.26%
DFA International Real Estate Sec I	US Fund Global Real Estate	DFITX 351	Health Care	9.66%
DFA Investment Grade I	US Fund Intermediate Core Bond	DFAPX 865	Materials	7.65%
DFA Five-Year Global Fixed-Income I	US Fund World Bond-USD Hedged	DFGBX 336	Energy	7.34%
DFA Intermediate-Term Municipal Bd	5	DFTIX 630	Real Estate	6.54%
DFA Intermediate-term Municipal Bu	1 05 Fund Muni National Interni	DELLY 030	Consumer Staples	6.24%
Index Performance			Communication Services	4.33%
	3 mo VTD 1 Vear 3 Vear	5 Vear 5 Vr. Std Dev	Utilities	1.61%

ev

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std De
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

Materials		7.65%
Energy		7.34%
Real Estate		6.54%
Consumer Staples		6.24%
Communication Services		4.33%
Utilities		1.61%
Other		0.00%
Credit Rating		
AAA	82.77%	
-	82.77 % 10.49 %	
AAA		
AAA BBB	10.49 %	
AAA BBB BB	10.49 % 0.37 %	
AAA BBB BB B	10.49 % 0.37 % 0.00 %	

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¹Performance The 3D/Dimensional 50 Tax-Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 50 Tax-Sensitive Portfolio Strategy which uses Tax-Aware Dimensional Funds (where available), Dimensional Funds or Dimensional Sub-Advised Funds to target 50% equity exposure and 50% Fixed Income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account scale to total value of household assets. Performance data shown represents past performance.

²Growth of \$200,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

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Investment Objective and Strategy

The 3D/Dimensional 50 Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 50% / 50% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 50% MSCI All-Country World Index ("ACWI") and 50% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least five years.

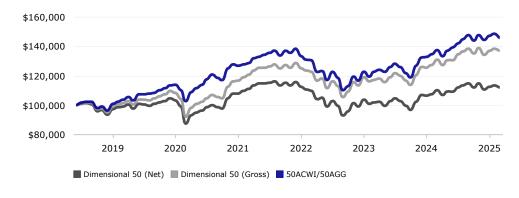
Risk Rating: Balanced Allocation



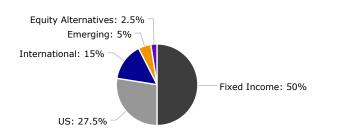
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 50 (Net)	1.23%	1.23%	1.58%	0.62%	5.03%	-	1.66%
Dimensional 50 (Gross)	1.99%	1.99%	4.65%	3.67%	8.21%	-	4.75%
50ACWI/50AGG	0.76%	0.76%	6.09%	3.74%	7.27%	-	5.72%

Growth of \$100,000²



Asset Allocation



Benefits

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Annual Returns¹

	Dimensional 50 (Net)	Dimensional 50 (Gross)	50ACWI/50AGG
2025	1.23	1.99	0.76
2024	3.35	6.46	9.15
2023	7.94	11.20	13.38
2022	-14.52	-11.88	-15.47
2021	7.48	10.73	8.18
2020	3.02	6.14	12.64
2019	12.15	15.53	17.63
2018	-6.76	-5.34	-3.66

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 50

As of 03/31/2025

10.60%

0.21

3.02%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

5.36 0.25%

Portfolio Characteristics³

•								
Name		Asset Clas	S		Symbo	ol Holdings	Standard Deviation	
Dimensional US High Profitability E	TF	Large Cap	Blend		DUHP	172	Sharpe Ratio Portfolio Yield	
DFA US Large Cap Value I		US Fund La	arge Value		DFLV>	334	Number of Securities	
JHancock Multifactor Mid Cap ETF		US Fund №	1id-Cap Bler	nd	JHMM	1 669	Effective Duration	
DFA US Small Cap Value I		US Fund Si	mall Value		DFSV	X 1032	Weighted Average Fund Expens	е
DFA US Micro Cap I		US Fund Si	mall Blend		DFSC)	X 1697	Weighted Average Credit Rating	5
Dimensional International High Pbl	y ETF	US Fund Fo	oreign Large	e Growth	DIHP	466	Sector Breakdown	
DFA International Value I		US Fund Fo	oreign Large	e Value	DFIVX	518	Financials	
DFA International Small Company I		US Fund Fo	oreign Smal	I/Mid Blend	DFISX	4059	Information Technology	
DFA International Small Cap Value	I	US Fund Fo	oreign Smal	l/Mid Value	DISVX	(1831	Industrials Consumer Discretionary	
DFA Emerging Markets I		US Fund D	viversified Ei	merging Mkts	5 DFEM	X 2259	Health Care	
DFA Emerging Markets Value I		US Fund D	viversified Ei	merging Mkts	B DFEV	X 3545	Materials	
DFA Emerging Markets Small Cap I		US Fund D	viversified Ei	merging Mkts	DEMS	X 4514	Energy	
DFA Real Estate Securities I		US Fund R	eal Estate		DFREX	X 140	Real Estate	
DFA International Real Estate Sec I			lobal Real E	state	DFITX		Consumer Staples Communication Services	
DFA Investment Grade I			ntermediate		DFAP		Utilities	
	. 1						Other	
DFA Five-Year Global Fixed-Income				USD Hedged			On the Darts	
DFA Intermediate Govt Fixed-Incor	me l	US Fund Ir	ntermediate	Government	DFIGX	(112	Credit Rating	
Index Performance							AAA	81.
	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	BBB	16.
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	5 rear 18.60%	16.76%	BB	0.0
JAF JUU IK	-4.27%	-4.2770	0.2070	7.0770	10.00%	10./0%	В	0.0

S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

AAA	81.78 %
BBB	16.62 %
BB	0.00 %
В	0.00 %
CCC	0.00 %
Others	1.60 %

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²Growth of \$200.000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

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DIMENSIONAL 60 TAX-SENSITIVE

As of 03/31/2025

Investment Objective and Strategy

The 3D/Dimensional 60 Tax-Sensitive Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 60% / 40% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 60% MSCI All-Country World Index ("ACWI") and 40% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least 7-10 years.

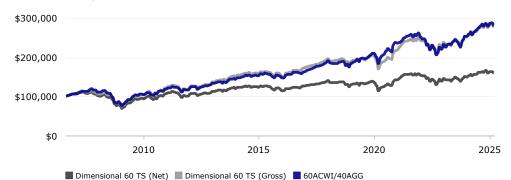




Portfolio Performance¹

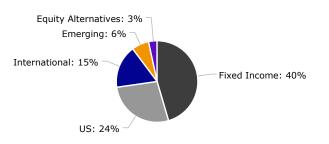
	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception	
Dimensional 60 TS (Net)	-0.13%	-0.13%	1.87%	1.55%	7.05%	2.46%	2.57%	
Dimensional 60 TS (Gross)	0.61%	0.61%	4.94%	4.63%	10.29%	5.56%	5.68%	
60ACWI/40AGG	0.35%	0.35%	6.32%	4.40%	8.85%	6.05%	5.74%	

Growth of \$100,000²





Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

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Annual Returns¹

	Dimensional 60 TS (Net)	Dimensional 60 TS (Gross)	60ACWI/40AGG
2025	-0.13	0.61	0.35
2024	5.81	8.99	10.78
2023	8.54	11.82	15.11
2022	-11.99	-9.28	-16.02
2021	11.64	15.00	10.20
2020	2.10	5.20	13.49
2019	12.01	15.39	19.42
2018	-9.55	-6.78	-5.51
2017	9.02	12.31	15.41
2016	5.98	9.19	5.92
2015	-4.36	-1.44	-0.95





DIMENSIONAL 60 TAX-SENSITIVE

Portfolio Characteristics³

As of 03/31/2025

Portfolio Holdings*

Name	Asset Cla	ass		Symbol	Holdings	Standard Deviation	10.39%
Dimensional US High Profitability ET	F Large Ca	p Blend		DUHP	172	Sharpe Ratio	0.30
Dimensional US Marketwide Value E	TF US Fund	Large Value		DFUV	1311	Portfolio Yield	2.74%
JHancock Multifactor Mid Cap ETF	US Fund	Mid-Cap Blen	d	JHMM	669	Number of Securities	18848
DFA US Micro Cap I	US Fund	Small Blend		DFSCX	1697	Effective Duration	4.10
Dimensional International High Pbly	ETF US Fund	Foreign Large	Growth	DIHP	466	Weighted Average Fund Expense	0.27%
Dimensional International Value ETF		Foreign Large		DFIV	520	Weighted Average Credit Rating	Aa2/AA-
DFA International Small Company I		Foreign Small		DFISX	4059	Sector Breakdown	
DFA International Small Cap Value I	US Fund	Foreign Small	/Mid Value	DISVX	1831	Financials	17.30%
DFA Emerging Markets I	US Fund	Diversified Er	nerging Mkts	DFEMX	2259	Information Technology	15.39%
DFA Emerging Markets Value I	US Fund	Diversified Er	nerging Mkts	DFEVX	3545	Industrials	13.68%
DFA Real Estate Securities I	US Fund	Real Estate		DFREX	140	Consumer Discretionary	10.26%
DFA International Real Estate Sec I	US Fund	Global Real E	state	DFITX	351	Health Care	9.66%
DFA Investment Grade I	US Fund	Intermediate	Core Bond	DFAPX	865	Materials	7.65%
DFA Five-Year Global Fixed-Income I		World Bond-U		DFGBX	336	Energy	7.34%
		Muni Nationa	0	DFTIX	630	Real Estate	6.54%
DFA Intermediate-Term Municipal Bd	un OSFuna	Munimationa	muerm	DELLA	030	Consumer Staples	6.24%
Index Performance						Communication Services	4.33%
index i criorindiloc	3 mo VTD	1 Voor	2 Voor	5 Vear	Vr. Std Dov	Utilities	1.61%

ev

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std De
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

Real Estate6.54%Consumer Staples6.24%
Communication Services 4.33%
Utilities 1.61%
Other 0.00%
Credit Rating
AAA 82.77 %
BBB 10.49 %
BB 0.37 %
B 0.00 %
CCC 0.00 %
Others 6.37%

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¹Performance The 3D/Dimensional 60 Tax-Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 60 Tax-Sensitive Portfolio Strategy which uses Tax-Aware Dimensional Funds (where available), Dimensional Funds To target 60% equity exposure and 40% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account 52 and total value of household assets. Performance data shown represents past performance.

²Growth of \$200,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's volatility to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio subtaing on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted performance that indicates a higher risk-adjusted performance.

***Portfolio Holdings** information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor.





Investment Objective and Strategy

The 3D/Dimensional 60 Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 60% / 40% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 60% MSCI All-Country World Index ("ACWI") and 40% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least 7-10 years.

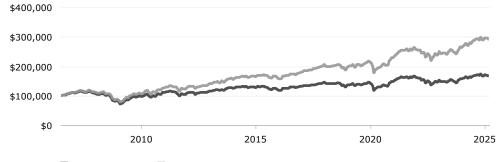
Risk Rating: Balanced Allocation



Portfolio Performance¹

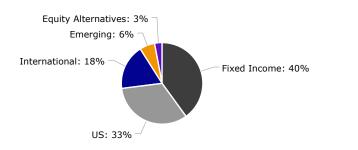
	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 60 (Net)	0.14%	0.14%	2.12%	1.49%	7.21%	2.56%	2.79%
Dimensional 60 (Gross)	0.89%	0.89%	5.20%	4.56%	10.45%	5.67%	5.91%

Growth of \$100,000²



Dimensional 60 (Net) Dimensional 60 (Gross)

Asset Allocation



Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

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Annual Returns¹

	Dimensional 60 (Net)	Dimensional 60 (Gross)
2025	0.14	0.89
2024	5.83	9.01
2023	8.74	12.03
2022	-12.52	-9.82
2021	11.84	15.21
2020	2.34	5.45
2019	12.34	15.72
2018	-9.68	-6.91
2017	9.21	12.51
2016	6.25	9.46
2015	-4.38	-1.46

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 60

As of 03/31/2025

10.44%

0.32

2.87%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

0.00%

1.60%

5.36 0.26%

Portfolio Characteristics³

CCC

Others

•									
Name		Asset Clas	s		Sym	bol H	oldings	Standard Deviation	
Dimensional US High Profitability E	TF	Large Cap	Blend		DUH	IP 17	72	Sharpe Ratio	
DFA US Large Cap Value I		US Fund La	arge Value		DFL	VX 33	34	Portfolio Yield Number of Securities	
JHancock Multifactor Mid Cap ETF	:	US Fund №	1id-Cap Blen	nd	JHM	IM 66	69	Effective Duration	
DFA US Small Cap Value I		US Fund Si	mall Value		DFS	VX 10	032	Weighted Average Fund Expense	
DFA US Micro Cap I		US Fund Si	mall Blend		DFS	CX 16	697	Weighted Average Credit Rating	
Dimensional International High Pb	y ETF		oreign Large	Growth	DIH		66	Sector Breakdown	
DFA International Value I		US Fund F	oreign Large	Value	DFIV	/X 5 ⁴	18	Financials	
			0 0					Information Technology	
DFA International Small Company			oreign Small		DFIS		059	Industrials	
DFA International Small Cap Value	I	US Fund Fo	oreign Small	/Mid Value	DISV	/X 18	831	Consumer Discretionary	
DFA Emerging Markets I		US Fund D	viversified Er	merging Mkts	DFE	MX 22	259	Health Care	
DFA Emerging Markets Value I		US Fund D	viversified Er	nerging Mkts	DFE	VX 35	545	Materials	
DFA Emerging Markets Small Cap I		US Fund D	viversified Er	nerging Mkts	DEM	1SX 45	514	Energy	
DFA Real Estate Securities I		US Fund R	eal Estate		DFRI	EX 14	40	Real Estate	
DFA International Real Estate Sec I		LIS Fund G	lobal Real E	state	DFIT		51	Consumer Staples Communication Services	
								Utilities	
DFA Investment Grade I		US Fund Ir	ntermediate	Core Bond	DFAI	PX 86	65		
DFA Five-Year Global Fixed-Income	el	US Fund W	Vorld Bond-U	USD Hedged	DFG	BX 33	36	Other	
DFA Intermediate Govt Fixed-Inco	me l	US Fund Ir	ntermediate	Government	DFIG	GX 11	12	Credit Rating	
								AAA 8	81.78%
Index Performance								BBB	16.62 %
	3 mo	YTD	1 Year	3 Year	5 Year		Std Dev	BB	0.00 %
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.	76%	В	0.00 %

S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

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¹Performance The 3D/Dimensional 60 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 60 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 60% equity exposure and 40% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$200.000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

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DIMENSIONAL 70 TAX-SENSITIVE

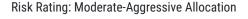
As of 03/31/2025

Investment Objective and Strategy

The 3D/Dimensional 70 Tax-Sensitive Portfolio is designed for moderately aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 70% / 30% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 70% MSCI All-Country World Index ("ACWI") and 30% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate-to-aggressive risk tolerance who can handle more short-term account volatility because they want to achieve higher returns and have an investment time horizon of at least ten years.

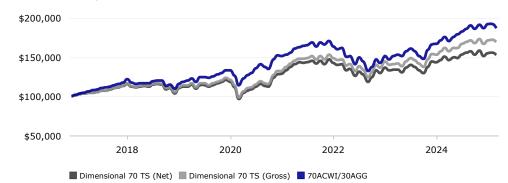




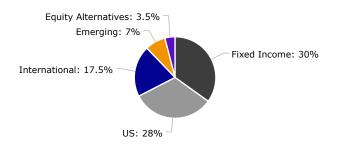
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 70 TS (Net)	0.80%	0.80%	1.25%	2.76%	9.60%	-	5.28%
Dimensional 70 TS (Gross)	1.55%	1.55%	4.30%	4.77%	11.34%	-	6.58%
70ACWI/30AGG	-0.06%	-0.06%	6.54%	5.04%	10.42%	-	7.89%

Growth of \$100,000²



Asset Allocation



Benefits

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Annual Returns¹

	Dimensional 70 TS (Net)	Dimensional 70 TS (Gross)	70ACWI/30AGG
2025	0.80	1.55	-0.06
2024	4.97	8.13	12.43
2023	11.49	12.82	16.86
2022	-11.74	-10.69	-16.58
2021	14.33	15.62	12.25
2020	6.15	7.07	14.28
2019	16.22	17.24	21.21
2018	-7.96	-7.37	-6.47
2017	13.09	13.77	17.50

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 70 TAX-SENSITIVE

Portfolio Characteristics³

As of 03/31/2025

Portfolio Holdings*

Name	Asset Class		Symbol	Holdings	Standard Deviation	11.92%
Dimensional US High Profitability ETI	F Large Cap Blend		DUHP	172	Sharpe Ratio	0.49
Dimensional US Marketwide Value E	TF US Fund Large Valu	Je	DFUV	1311	Portfolio Yield	2.54%
JHancock Multifactor Mid Cap ETF	US Fund Mid-Cap E	Blend	JHMM	669	Number of Securities	18848
DFA US Micro Cap I	US Fund Small Bler	nd	DFSCX	1697	Effective Duration	4.10
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		0			Real Estate	6.54%
DFA Intermediate-Term Municipal Bd	US Fund Muni Nati	onal Interm	DFTIX	630	Consumer Staples	6.24%
Index Performance					Communication Services	4.33%
	3 mo VTD 1 Veau	y 3 Vear 5 Vea	ar G	Vr. Std Dov	Utilities	1.61%

ev

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std De
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MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

Matchais	7.057	J
Energy	7.34%	ś
Real Estate	6.54%	ś
Consumer Stapl	es 6.24%	ś
Communication	Services 4.33%	ś
Utilities	1.61%	ś
Other	0.00%	ó
Credit Rating]	
Credit Rating	82.77 %	
AAA	82.77 %	
AAA BBB	82.77 % 10.49 %	
AAA BBB BB	82.77 % 10.49 % 0.37 %	
AAA BBB BB B	82.77 % 10.49 % 0.37 % 0.00 %	

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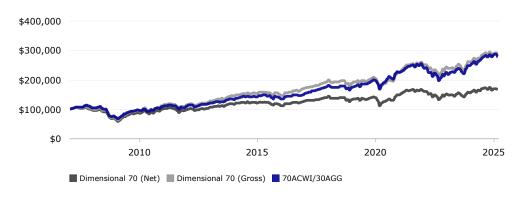
Risk Rating: Moderate-Aggressive Allocation



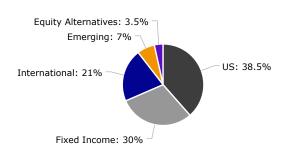
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 70 (Net)	1.22%	1.22%	1.74%	1.57%	8.38%	3.14%	2.88%
Dimensional 70 (Gross)	1.97%	1.97%	4.81%	4.65%	11.65%	6.27%	6.00%
70ACWI/30AGG	-0.06%	-0.06%	6.54%	5.04%	10.42%	6.77%	5.82%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

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Annual Returns¹

	Dimensional 70 (Net)	Dimensional 70 (Gross)	70ACWI/30AGG					
2025	1.22	1.97	-0.06					
2024	4.93	8.09	12.43					
2023	9.85	13.17	16.86					
2022	-14.23	-11.58	-16.58					
2021	13.27	16.68	12.25					
2020	3.96	7.12	14.28					
2019	14.35	17.79	21.21					
2018	-10.83	-8.09	-6.47					
2017	11.04	14.39	17.50					
2016	7.78	11.04	6.43					
2015	-4.37	-1.45	-1.28					





DIMENSIONAL 70

As of 03/31/2025

12,78%

0.29

2.72%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

0.00%

1.60%

5.36 0.27%

Portfolio Characteristics³

CCC

Others

Name		Asset Clas	Asset Class			l Holdings	Standard Deviation		
Dimensional US High Profitab	oility ETF	Large Cap	Blend		DUHP	172	Sharpe Ratio Portfolio Yield		
DFA US Large Cap Value I		US Fund La	arge Value		DFLV>	334	Number of Securities		
JHancock Multifactor Mid Ca	p ETF	US Fund M	US Fund Mid-Cap Blend		JHMM	669	Effective Duration		
DFA US Small Cap Value I		US Fund Si	mall Value		DFSV	< 1032	Weighted Average Fund Expense		
DFA US Micro Cap I		US Fund S	mall Blend		DFSC)	٢ 1697	Weighted Average Credit Rating		
Dimensional International Hig	gh Pbly ETF	US Fund Fo	oreign Large	Growth	DIHP	466	Sector Breakdown		
DFA International Value I	, ,	US Fund Fo	oreign Large	Value	DFIVX	518	Financials		
DFA International Small Com	nany l		oreign Small		DFISX		Information Technology		
			U U				Industrials		
DFA International Small Cap	Value I	US Fund Fo	oreign Small	/Mid Value	DISVX	1831	Consumer Discretionary		
DFA Emerging Markets I		US Fund D	iversified Er	nerging Mkts	DFEM	X 2259	Health Care		
DFA Emerging Markets Value	L	US Fund D	iversified Er	nerging Mkts	DFEV	K 3545	Materials		
DFA Emerging Markets Small	Cap I	US Fund D	iversified Er	nerging Mkts	DEMS	X 4514	Energy		
DFA Real Estate Securities I		US Fund R	eal Estate		DFREX	K 140	Real Estate Consumer Staples		
DFA International Real Estate	e Sec I	US Fund G	lobal Real E	state	DFITX	351	Communication Services		
DFA Investment Grade I		US Fund Ir	termediate	Core Bond	DFAP		Utilities		
							Other		
DFA Five-Year Global Fixed-Ir	icome I			JSD Hedged	DFGB	X 336			
DFA Intermediate Govt Fixed	-Income I	US Fund Ir	ntermediate	Government	DFIGX	112	Credit Rating		
Index Desfermence							AAA 81.78 %		
Index Performance							BBB 16.62 %		
	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	BB 0.00 %		
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%	B 0.00 %		

S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

Disclaimer

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¹Performance The 3D/Dimensional 70 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 70 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 70% equity exposure and 30% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$200.000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor.



DIMENSIONAL 80 TAX-SENSITIVE

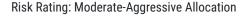
As of 03/31/2025

Investment Objective and Strategy

The 3D/Dimensional 80 Tax-Sensitive Portfolio is designed for moderately aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 80% / 20% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 80% MSCI All-Country World Index ("ACWI") and 20% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate-to-aggressive risk tolerance who can handle more short-term account volatility because they want to achieve higher returns and have an investment time horizon of at least ten years.

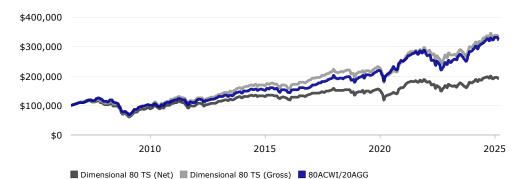




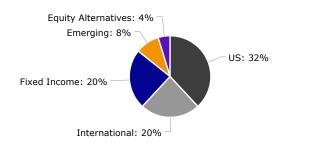
Portfolio Performance¹

Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
-0.49%	-0.49%	1.57%	1.85%	9.74%	3.60%	3.50%
0.25%	0.25%	4.63%	4.94%	13.05%	6.74%	6.64%
-0.47%	-0.47%	6.76%	5.68%	12.01%	7.48%	6.47%
	-0.49% 0.25%	-0.49% -0.49% 0.25% 0.25%	-0.49% -0.49% 1.57% 0.25% 0.25% 4.63%	-0.49% -0.49% 1.57% 1.85% 0.25% 0.25% 4.63% 4.94%	-0.49% -0.49% 1.57% 1.85% 9.74% 0.25% 0.25% 4.63% 4.94% 13.05%	-0.49% -0.49% 1.57% 1.85% 9.74% 3.60% 0.25% 0.25% 4.63% 4.94% 13.05% 6.74%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

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Annual Returns¹

	Dimensional 80 TS (Net)	Dimensional 80 TS (Gross)	80ACWI/20AGG				
2025	-0.49	0.25	-0.47				
2024	6.79	10.00	14.10				
2023	10.99	14.34	18.62				
2022	-13.89	-11.23	-17.15				
2021	16.38	19.87	14.32				
2020	3.04	6.17	15.00				
2019	15.56	19.03	23.01				
2018	-11.81	-9.09	-7.44				
2017	12.24	15.62	19.62				
2016	8.66	11.94	6.92				
2015	-4.63	-1.72	-1.62				





DIMENSIONAL 80 TAX-SENSITIVE

Portfolio Characteristics³

As of 03/31/2025

Portfolio Holdings*

Name	Asset Class	Symbol	Holdings	Standard Deviation	13.74%
Dimensional US High Profitability ETF	F Large Cap Blend	DUHP	172	Sharpe Ratio	0.32
Dimensional US Marketwide Value ET	TF US Fund Large Value	DFUV	1311	Portfolio Yield	2.44%
JHancock Multifactor Mid Cap ETF	US Fund Mid-Cap Blend	JHMM	669	Number of Securities	18848
DFA US Micro Cap I	US Fund Small Blend	DFSCX	1697	Effective Duration	4.10
Dimensional International High Pbly E	ETF US Fund Foreign Large Gro	wth DIHP	466	Weighted Average Fund Expense	0.29%
Dimensional International Value ETF	US Fund Foreign Large Valu		520	Weighted Average Credit Rating	Aa2/AA-
DFA International Small Company I	US Fund Foreign Small/Mid		4059	Sector Breakdown	
DFA International Small Cap Value I	US Fund Foreign Small/Mid	Value DISVX	1831	Financials	17.30%
DFA Emerging Markets I	US Fund Diversified Emerg	ing Mkts DFEMX	2259	Information Technology	15.39%
DFA Emerging Markets Value I	US Fund Diversified Emerg	ing Mkts DFEVX	3545	Industrials	13.68%
DFA Real Estate Securities I	US Fund Real Estate	DFREX	140	Consumer Discretionary	10.26%
DFA International Real Estate Sec I	US Fund Global Real Estate	DFITX	351	Health Care	9.66%
DFA Investment Grade I	US Fund Intermediate Core	Bond DFAPX	865	Materials	7.65%
DFA Five-Year Global Fixed-Income I	US Fund World Bond-USD	Hedged DFGBX	336	Energy	7.34%
DFA Intermediate-Term Municipal Bd		0	630	Real Estate	6.54%
DFA Intermediate-rerni Municipal Bu		DELLA DELLA	030	Consumer Staples	6.24%
Index Performance				Communication Services	4.33%
	3 mo VTD 1 Vear 3	Vear 5 Vear 5	Vr. Std Dov	Utilities	1.61%

ev

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std De
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

I laterials		7.0570
Energy		7.34%
Real Estate		6.54%
Consumer Staples		6.24%
Communication Services		4.33%
Utilities		1.61%
Other		0.00%
Credit Rating		
Credit Rating	82.77 %	
	82.77 % 10.49 %	
AAA		
AAA BBB	10.49 %	
AAA BBB BB	10.49 % 0.37 %	
AAA BBB BB B	10.49 % 0.37 % 0.00 %	

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¹Performance The 3D/Dimensional 80 Tax-Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 80 Tax-Sensitive Portfolio Strategy which uses Tax-Aware Dimensional Funds (where available), Dimensional Funds To target 80% equity exposure and 20% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account is called to target 80% equity exposure and 20% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account is called to target to flow of household assets. Performance data shown represents past performance.

²Growth of \$200,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

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Investment Objective and Strategy

The 3D/Dimensional 80 Portfolio is designed for moderately aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 80% / 20% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 80% MSCI All-Country World Index ("ACWI") and 20% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a moderate-to-aggressive risk tolerance who can handle more short-term account volatility because they want to achieve higher returns and have an investment time horizon of at least ten years.

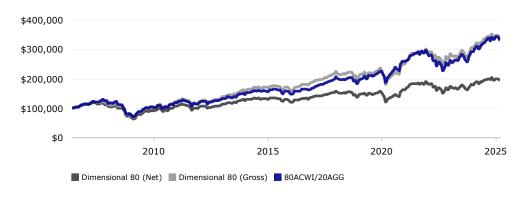
Risk Rating: Moderate-Aggressive Allocation



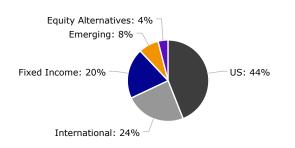
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Dimensional 80 (Net)	-0.29%	-0.29%	2.14%	2.12%	10.09%	3.79%	3.59%
Dimensional 80 (Gross)	0.46%	0.46%	5.22%	5.21%	13.41%	6.93%	6.73%
80ACWI/20AGG	-0.47%	-0.47%	6.76%	5.68%	12.01%	7.48%	6.59%

Growth of \$100,000²



Asset Allocation



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Annual Returns¹

	Dimensional 80 (Net)	Dimensional 80 (Gross)	80ACWI/20AGG				
2025	-0.29	0.46	-0.47				
2024	7.32	10.55	14.10				
2023	11.16	14.51	18.62				
2022	-13.71	-11.05	-17.15				
2021	17.25	20.77	14.32				
2020	2.45	5.57	15.00				
2019	15.99	19.47	23.01				
2018	-11.80	-9.09	-7.44				
2017	12.39	15.78	19.62				
2016	8.79	12.08	6.92				
2015	-4.77	-1.86	-1.62				





DIMENSIONAL 80

As of 03/31/2025

13.65%

0.33

2.57%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

81.78%

16.62% 0.00%

0.00%

0.00%

1.60%

5.36 0.28%

Portfolio Characteristics³

B

CCC

Others

· · · · · · · · · · · · · · · · · · ·									
Name		Asset Clas	s		Symbol	Holdings	Standard Deviation		
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DFA US Large Cap Value I		US Fund La	arge Value		DFLVX	334	Portfolio Yield Number of Securities		
JHancock Multifactor Mid Cap ETF		US Fund №	lid-Cap Blen	ıd	JHMM	669	Effective Duration		
DFA US Small Cap Value I		US Fund Si	mall Value		DFSVX	1032	Weighted Average Fund Expense		
DFA US Micro Cap I		US Fund Si	mall Blend		DFSCX	1697	Weighted Average Credit Rating		
Dimensional International High Pbly	ETF	US Fund Fo	oreign Large	Growth	DIHP	466	Sector Breakdown		
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DFA International Small Company I		US Fund Fo	US Fund Foreign Small/Mid Blend			4059	Information Technology Industrials		
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DFA International Real Estate Sec I		US Fund G	lobal Real Es	state	DFITX	351	Communication Services		
DFA Investment Grade I		US Fund In	itermediate	Core Bond	DFAPX	865	Utilities		
DFA Five-Year Global Fixed-Income I		US Fund W	/orld Bond-l	JSD Hedged	DFGBX	336	Other		
DFA Intermediate Govt Fixed-Income	e l	US Fund In	itermediate	Government	DFIGX	112	Credit Rating		
Index Performance							AAA	8	
muex Performance	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	BBB		
	3 mo 4 27%	עוז 1.07%		3 Tear	5 fear	14 74%	BB		

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S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

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¹Performance The 3D/Dimensional 80 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 80 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 80% equity exposure and 20% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$200.000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and Dimensional fund holdings. Number of Securities is the sum total of securities held within each Dimensional fund. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Dec 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using Dimensional funds to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular security. As with all investments, Dimensional funds have risks. For more detailed information on the Dimensional funds used in 3D Portfolios investors may request a prospectus by contacting their advisor.



DIMENSIONAL 90 TAX-SENSITIVE

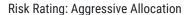
As of 03/31/2025

Investment Objective and Strategy

The 3D/Dimensional 90 Tax-Sensitive Portfolio is designed for aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses Dimensional funds to target 90% / 10% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 90% MSCI All-Country World Index ("ACWI") and 10% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, and profitability, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with the highest risk tolerance who want to maximize their return potential and can handle high short-term account volatility and have an investment time horizon over ten years.

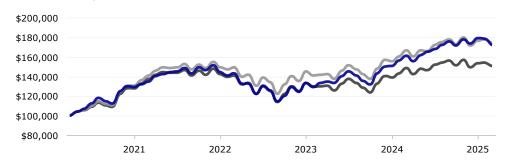




Portfolio Performance¹

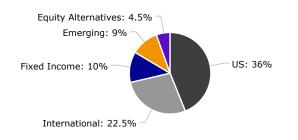
Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
0.94%	0.94%	1.55%	2.26%	-	-	8.69%
1.69%	1.69%	4.62%	5.36%	-	-	11.97%
-0.88%	-0.88%	6.97%	6.31%	-	-	11.69%
	0.94% 1.69%	0.94% 0.94% 1.69% 1.69%	0.94% 0.94% 1.55% 1.69% 1.69% 4.62%	0.94% 0.94% 1.55% 2.26% 1.69% 1.69% 4.62% 5.36%	0.94% 0.94% 1.55% 2.26% - 1.69% 1.69% 4.62% 5.36% -	0.94% 0.94% 1.55% 2.26% 1.69% 1.69% 4.62% 5.36%

Growth of \$100,000²



Dimensional 90 TS (Net) Dimensional 90 TS (Gross) 90ACWI/10AGG

Asset Allocation



Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Dimensional 90 TS (Net)	Dimensional 90 TS (Gross)	90ACWI/10AGG
2025	0.94	1.69	-0.88
2024	6.24	9.43	15.78
2023	12.38	15.77	20.40
2022	-15.33	-12.72	-17.75
2021	15.39	18.85	16.42
2020	27.97	30.47	30.16

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 90 TAX-SENSITIVE

Portfolio Characteristics³

As of 03/31/2025

Portfolio Holdings*

Name	Asset Class	Symbol Holdings	Standard Deviation	14.27%
Dimensional US High Profitability ETI	F Large Cap Blend	DUHP 172	Sharpe Ratio	0.66
Dimensional US Marketwide Value E	TF US Fund Large Value	DFUV 1311	Portfolio Yield	2.34%
JHancock Multifactor Mid Cap ETF	US Fund Mid-Cap Blend	JHMM 669	Number of Securities	18848
DFA US Micro Cap I	US Fund Small Blend	DFSCX 1697	Effective Duration	4.10
Dimensional International High Pbly I	ETF US Fund Foreign Large Growth	DIHP 466	Weighted Average Fund Expense	0.30%
Dimensional International Value ETF		DFIV 520	Weighted Average Credit Rating	Aa2/AA-
DFA International Small Company I	US Fund Foreign Small/Mid Blend	DFISX 4059	Sector Breakdown	
DFA International Small Cap Value I	US Fund Foreign Small/Mid Value	DISVX 1831	Financials	17.30%
DFA Emerging Markets I	US Fund Diversified Emerging Mkts	DFEMX 2259	Information Technology	15.39%
DFA Emerging Markets Value I	US Fund Diversified Emerging Mkts	DFEVX 3545	Industrials	13.68%
DFA Real Estate Securities I	US Fund Real Estate	DFREX 140	Consumer Discretionary	10.26%
DFA International Real Estate Sec I	US Fund Global Real Estate	DFITX 351	Health Care	9.66%
DFA Investment Grade I	US Fund Intermediate Core Bond	DFAPX 865	Materials	7.65%
DFA Five-Year Global Fixed-Income I			Energy	7.34%
DFA Intermediate-Term Municipal Bd	6	DFTIX 630	Real Estate	6.54%
DFA Intermediate-Term Municipal Bu	d i OS Fund Muni National Interni	DELLY 020	Consumer Staples	6.24%
Index Performance			Communication Services	4.33%
	3 mo VTD 1 Vear 3 Vear	5 Vear 5 Vr. Std Dev	Utilities	1.61%

ev

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std De
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	16.76%
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	22.24%
MSCI ACWI Net USD	-1.30%	-1.30%	7.18%	6.92%	15.18%	15.70%
MSCI EAFE	6.87%	6.87%	4.88%	6.05%	11.77%	16.03%
MSCI Emerging Markets	2.40%	2.40%	5.56%	-1.20%	5.35%	16.49%
Bloomberg US Agg. Bond	2.78%	2.78%	4.89%	0.33%	-0.51%	6.34%

Energy		7.34%
Real Estate		6.54%
Consumer Staples		6.24%
Communication Services		4.33%
Utilities		1.61%
Other		0.00%
Credit Rating		
Creat Rating		
AAA	82.77 %	
	82.77 % 10.49 %	
AAA	020770	
AAA BBB	10.49 %	
AAA BBB BB	10.49 % 0.37 %	
AAA BBB BB B	10.49 % 0.37 % 0.00 %	

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolios(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D/Dimensional 90 Tax-Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 90 Tax-Sensitive Portfolio Strategy which uses Tax-Aware Dimensional Funds (where available), Dimensional Funds To target 90% equity exposure and 10% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account is called to a float lotal value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

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Investment Objective and Strategy

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Investor Profile

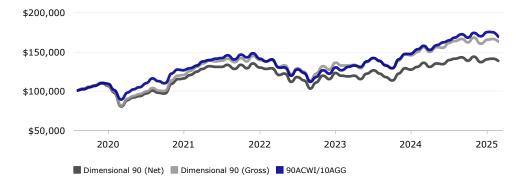
Designed for investors with the highest risk tolerance who want to maximize their return potential and can handle high short-term account volatility and have an investment time horizon over ten years.



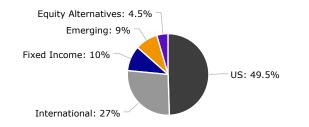
Portfolio Performance¹

Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
0.94%	0.94%	1.55%	2.29%	11.53%	-	5.93%
1.69%	1.69%	4.62%	5.39%	14.89%	-	9.14%
-0.88%	-0.88%	6.97%	6.31%	13.59%	-	9.78%
	0.94% 1.69%	0.94% 0.94% 1.69% 1.69%	0.94% 0.94% 1.55% 1.69% 1.69% 4.62%	0.94%0.94%1.55%2.29%1.69%1.69%4.62%5.39%	0.94%0.94%1.55%2.29%11.53%1.69%1.69%4.62%5.39%14.89%	0.94% 0.94% 1.55% 2.29% 11.53% - 1.69% 1.69% 4.62% 5.39% 14.89% -

Growth of \$100,000²



Asset Allocation



Benefits

3D/Dimensional Global Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our datadriven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the longterm.

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Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Dimensional 90 (Net)	Dimensional 90 (Gross)	90ACWI/10AGG
2025	0.94	1.69	-0.88
2024	6.24	9.43	15.78
2023	11.60	14.97	20.40
2022	-14.40	-11.76	-17.75
2021	17.36	20.88	16.42
2020	4.30	7.47	15.66
2019	10.01	11.09	10.04

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.





DIMENSIONAL 90

As of 03/31/2025

16.90%

0.43

2.42%

22897

Aa2/A+

16.97%

15.06%

13.45%

10.74%

9.84% 8.03%

7.53%

6.53%

6.33%

3.92% 1.61%

0.00%

1.60%

5.36 0.30%

Portfolio Characteristics³

Others

•									
Name		Asset Clas	S		Sy	mbol	Holdings	Standard Deviation	
Dimensional US High Profitability E	TF	Large Cap	Blend		DU	UHP	172	Sharpe Ratio	
DFA US Large Cap Value I		US Fund La	arge Value		DF	FLVX	334	Portfolio Yield Number of Securities	
JHancock Multifactor Mid Cap ETF		US Fund M	1id-Cap Bler	nd	JH	IMM	669	Effective Duration	
DFA US Small Cap Value I		US Fund Si	mall Value		DF	FSVX	1032	Weighted Average Fund Expense	
DFA US Micro Cap I		US Fund Si				FSCX	1697	Weighted Average Credit Rating	
·	. ETE			Currentle				Sector Breakdown	
Dimensional International High Pbl	EIF		oreign Large			IHP	466		
DFA International Value I		US Fund Fo	oreign Large	e Value	DF	FIVX	518	Financials	
DFA International Small Company I		US Fund Fo	oreign Small	l/Mid Blend	DF	FISX	4059	Information Technology Industrials	
DFA International Small Cap Value I		US Fund Fo	oreign Small	l/Mid Value	DI	ISVX	1831	Consumer Discretionary	
DFA Emerging Markets I		US Fund D	iversified Er	merging Mkts	DF	FEMX	2259	Health Care	
DFA Emerging Markets Value I		US Fund D	iversified Er	merging Mkts	DF	FEVX	3545	Materials	
DFA Emerging Markets Small Cap I		US Fund D	iversified Er	merging Mkts	DE	EMSX	4514	Energy	
DFA Real Estate Securities I		US Fund R	eal Estate		DF	FREX	140	Real Estate	
DFA International Real Estate Sec I		LIS Fund G	lobal Real E	state	DF	FITX	351	Consumer Staples Communication Services	
								Utilities	
DFA Investment Grade I		US Fund In	ntermediate	Core Bond	DF	FAPX	865		
DFA Five-Year Global Fixed-Income	I	US Fund W	/orld Bond-	USD Hedged	DF	FGBX	336	Other	
DFA Intermediate Govt Fixed-Incon	ne I	US Fund In	ntermediate	Government	DF	FIGX	112	Credit Rating	
								AAA	81.78%
Index Performance								BBB	16.62 %
	3 mo	YTD	1 Year	3 Year	5 Year		Yr. Std Dev	BB	0.00 %
S&P 500 TR	-4.27%	-4.27%	8.28%	9.07%	18.60%	1	16.76%	В	0.00 %
Russell 2000	-9.79%	-9.79%	-5.37%	-0.97%	11.76%	2	22.24%	ССС	0.00%

D	isc	ai	im	er	

MSCI EAFE

MSCI ACWI Net USD

MSCI Emerging Markets

Bloomberg US Agg. Bond

-1.30%

6.87%

2.40%

2.78%

-1.30%

6.87%

2.40%

2.78%

7.18%

4.88%

5.56%

4.89%

6.92%

6.05%

-1.20%

0.33%

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15.18%

11.77%

5.35%

-0.51%

15.70%

16.03%

16.49%

6.34%

¹Performance The 3D/Dimensional 90 Portfolio Composite includes all discretionary accounts that are managed to the 3D/Dimensional 90 Portfolio Strategy which uses Dimensional Funds or Dimensional Sub-Advised Funds to target 90% equity exposure and 10% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

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