Objective:
The Equity Portfolio concentrates on the attainment of portfolio growth by investing generally 90% or above in a mix of stock funds across a responsible allocation of asset classes, and with an orientation to both growth and value. Proportionally greater risk is assumed in the pursuit of proportionally greater return.

Suitability:
The Equity Portfolio is an appropriate consideration for a limited number of clients. Full exposure to stock markets that can move up and down quickly and significantly suggest a long investment horizon. A firm understanding of the increased risk associated with this portfolio is an essential requirement.

- **Large Growth (30%)**: Vanguard Capital Opportunity Fund
- **Large Value (26%)**: Vanguard Wellington Fund
- **Small/Mid (21%)**: Vanguard Small-Cap Index Fund
- **International (22%)**: Vanguard International Growth Fund
- **Bonds/Cash (1%)**: Aramco Income Fund