CABE Sample Investment Approach

A Discussion of The “Conservative” Approach For A $1 Million Dollar Portfolio
Cash Reserves- $200,000
BlackRock Intermediate Term Fixed Income Account - $300,000
Bond Ladder- $500,000

*note that CABE has contributed $300,000 to this strategy

Eaton Vance CORPORATE LADDERS
1-5 Yr, A- Minimum

Ladder Portfolios structure accounts for minimum 1% cash. This information is for illustrative purposes only, is subject to change at any time and should not be considered investment advice or a recommendation to buy or sell any particular security. Information based on a representative client account and is subject to change. The representative client portfolio was chosen because it is unrestricted and fairly represents the style of the manager(s). Actual result will vary for each client. This information is supplemental to the GIPS® presentation for the composite. Please refer to the back of this presentation for additional important information. Past performance does not predict or guarantee future results.