

Fund Recommendations



hooker & holcombe

Sell	Replace with
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Corporate Bonds

PIMCO Investment
Grade Credit Bond
(-4%)

Invesco Corporate Bond
R6
(6%)

Vanguard Interterm-Term
Investment-Grade
(-4%)

(6%)

Reduce	Add
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Intermediate Core Plus

Fidelity® Total Bond
Fund
(-1%)

Metropolitan West
Total Return
(-2%)

Dodge & Cox Income
(3%)

Sell	Replace with
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High Yield Bonds

PIMCO High Yield A
(-1%)

PGIM High Yield R6
(1%)

Reduce	Add
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Intermediate Core

Western Asset Core
Bond
(-4%)

American Funds Bond
Fund of Amer
(4%)

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Reduce	Add
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Nontraditional Bonds

- BlackRock Strategic Income (-1%)
- Western Asset Total Return Uncons (-1%)
- PIMCO Mortgage Opportunities (2%)

Sell	Replace with
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- World Bond
- Loomis Sayles Global Bond (-2%)
- Dodge & Cox Global Bond (2%)

Sell	Replace with
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Multisector Bonds

JHancock Income (-2%)

Neuberger Berman Strategic Inc (2%)

	Add
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Inflation Protected

Fidelity® Inflation-Prot Bd Index (4%)

Equity Fund Recommendations



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	Reduce	Increase
US Large Blend		

Vanguard Dividend Growth (-4%)	Vanguard Large Cap Index (2%)
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