

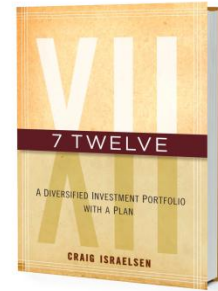


7Twelve™

A Multi-Asset Balanced Strategy

www.7TwelvePortfolio.com

Craig L. Israelsen, Ph.D.



The **2012 7Twelve** Research Report is a 60+ page document that provides fund-specific construction guidelines and performance analysis for the **7Twelve** portfolio--a **multi-asset investment strategy**. The 60+ page 7Twelve Research Report (initial purchase price \$350, optional annual renewal price \$150) is specifically written for financial advisors and outlines several 7Twelve models: an “Active” model that uses actively managed funds, a “Passive” model that uses only ETFs and index funds, a Fidelity model, a Vanguard model, a T. Rowe Price model, and a tax-efficient model. A **DFA 7Twelve** model has been added this year.

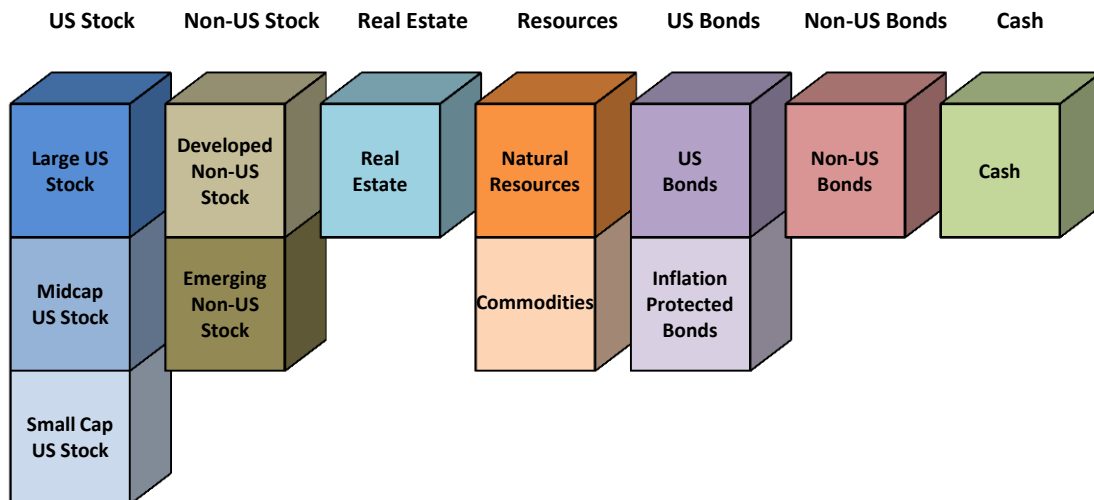
New Reports Available: New this year are three **short-format 7Twelve research reports** (6 pages each) designed for individual investors wanting 7Twelve design information specific to individual mutual fund families (**Fidelity, Vanguard, T. Rowe Price**). Priced at \$75 for the initial purchase (optional annual renewal is \$25). These short-format reports are helpful for individual investors wanting to assemble more diversified 401(k) accounts, IRA accounts, or regular investment accounts using Fidelity, Vanguard, or T. Rowe Price mutual funds.

The “7” of 7Twelve represents the suggested number of broad asset classes to be included. The “Twelve” represents the 12 separate mutual funds or exchange traded products to fully represent the 7 asset classes. The **7Twelve** portfolio has a **65/35 allocation**: with 65% of the portfolio invested in equity and diversifying assets and 35% invested in bonds and cash.

7Twelve™
7 Broad Asset Categories, 12 Funds

Eight Equity and Diversifying Funds
65% of Overall Portfolio Allocation

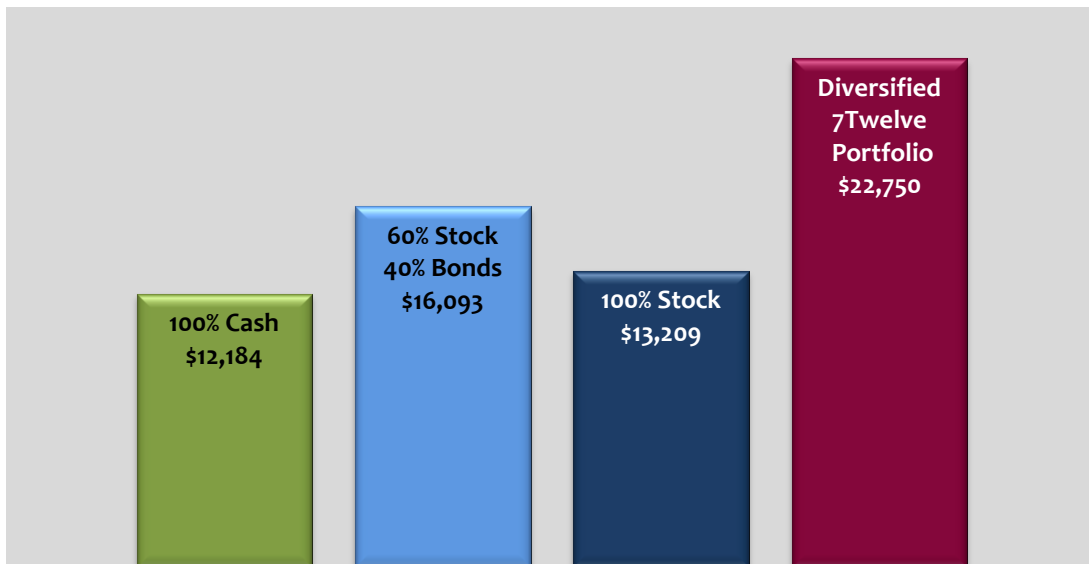
Four Fixed Income Funds
35% of Overall Portfolio Allocation



The 2012 7Twelve Research Report provides extremely detailed analysis and outlines several versions of the 7Twelve portfolio—complete with all fund names, tickers, and back-tested performance history. The 7Twelve balanced portfolio is a Qualified Default Investment Alternative (QDIA) under the provisions of the Pension Protection Act of 2006.

10-Year Growth of \$10,000

January 1, 2002 to December 31, 2011



Performance updates for the 7Twelve are available on www.7TwelvePortfolio.com

To purchase 7Twelve products: Please mail the Order Form on the following page or email me. 7Twelve products are sent via email in pdf format or PowerPoint format.

2012 7Twelve products: (designed for financial advisors)

- \$350 2012 7Twelve Research Report—1st time purchase (60+ page pdf)
- \$150 2012 7Twelve Research Report (renewal price)
- \$250 2012 7Twelve PowerPoint Presentation—1st time purchase (60+ slides)

2012 Short-format 7Twelve Research Report: (designed for individual investors)


- \$75 2012 Building a Vanguard 7Twelve Portfolio (6 page pdf)
- \$75 2012 Building a Fidelity 7Twelve Portfolio (6 page pdf)
- \$75 2012 Building a T. Rowe Price 7Twelve Portfolio (6 page pdf)

Questions? craig@7TwelvePortfolio.com

Craig L. Israelsen, Ph.D. is not an investment advisor. He is a researcher, author and consultant.

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2012 7Twelve PowerPoint Presentation for Financial Advisors <i>(50+ slides outlining general principles of diversification)</i>	\$250* initial purchase	PowerPoint <input type="checkbox"/> \$250
2012 Short-Format 7Twelve Research Reports for Individual Investors <i>(6 page pdf with fund specific information for each mutual fund family)</i>	\$75 per report <i>(\$25 optional annual renewal after initial purchase)</i>	Vanguard <input type="checkbox"/> \$75 Fidelity <input type="checkbox"/> \$75 T. Rowe Price <input type="checkbox"/> \$75
<i>Bulk discounts available for all 7Twelve products—contact me for details</i>		TOTAL COST →

* Once purchased, the annually updated 7Twelve PowerPoint is emailed to you at no charge (in mid-January).

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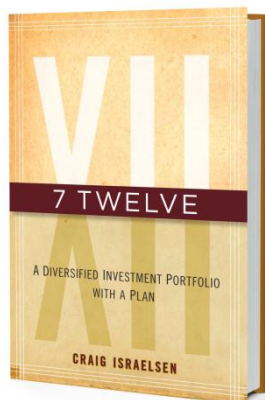
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by Craig L. Israelsen, Ph.D.



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