

USA Portfolio II: Growth & Aggressive Growth

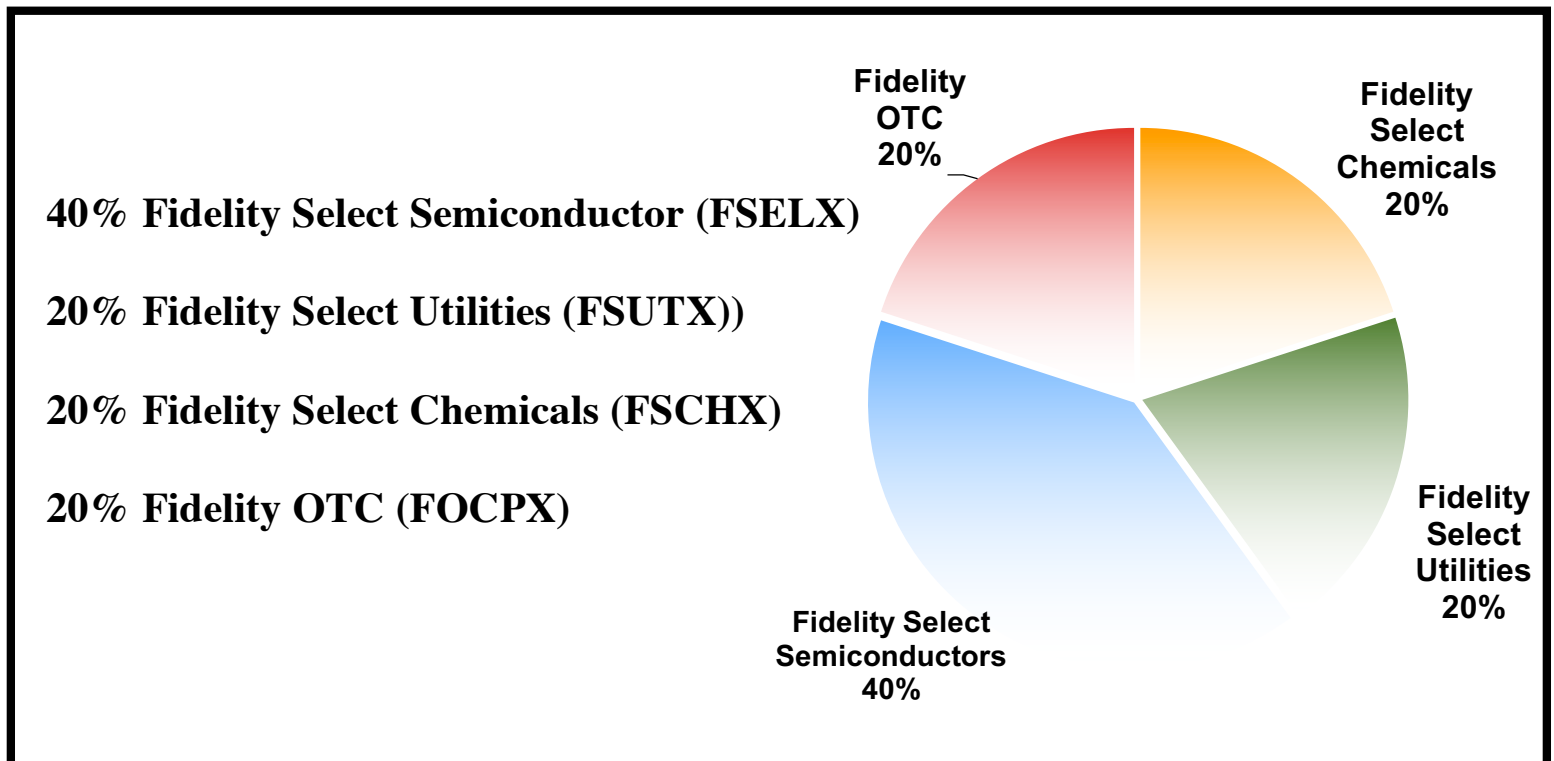
Portfolio recommendations June 2nd

Portfolio performance updated as May 31st

Trading Restrictions: To avoid Fidelity trading restrictions all funds must be held for at least 30 days.

Growth Portfolio: Accumulating Wealth: This portfolio is intended for aggressive investors or individuals who have at least 7 years before retirement. This portfolio could experience losses in a severe market decline. This portfolio will normally invest 80% of its assets in The Diversified Williams' Sector Strength Strategy. To deal with the current market conditions, this portfolio has 100% of its asset invested in securities.

- **Transfer Fidelity Select Banking (FSRBX): ½ to Fidelity Select Semiconductors (FSELX) & ½ to Fidelity Select Utilities (FSUTX)**
- **Transfer Fidelity Extended Market Index (FSEMXX) to Fidelity OTC (FOCPX)**



May Return = -0.2%

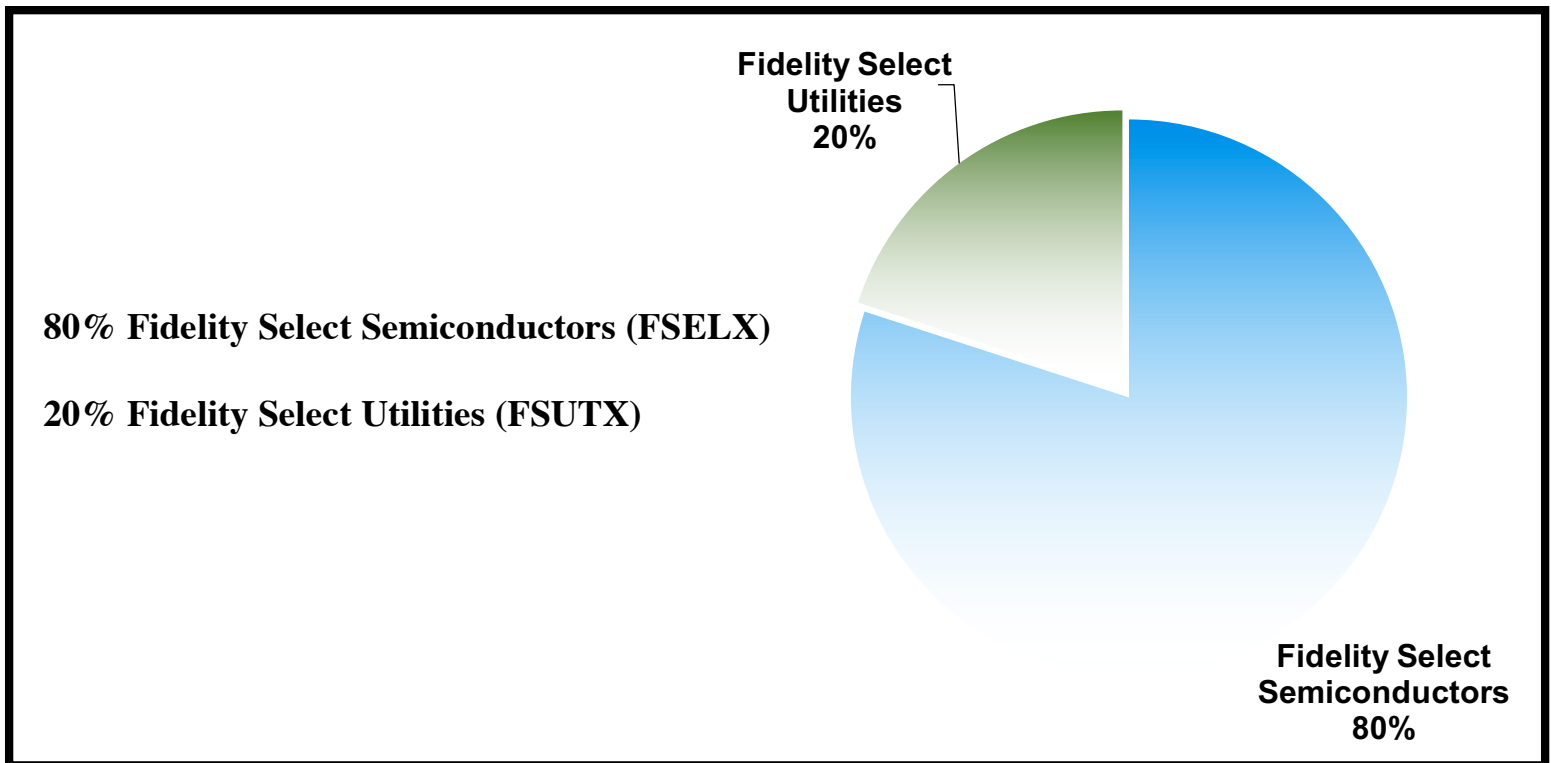
2017 YTD Return = -3.3%

2017 1st Quarter Return = -2.3%

15 year Average = 13.2%

Aggressive Portfolio Growth A: Accumulating Wealth: This portfolio is the most aggressive of all portfolios. It consists exclusively of the Williams' Sector Strength Strategy top fund and a top performing Fidelity Domestic Stock Fund. This portfolio could experience losses in a severe market decline. It's intended for very aggressive investors and due to its investment style this portfolio will remain fully invested in sector and stock funds.

- **Transfer Fidelity Select Banking (FSRBX) to Fidelity Select Semiconductors (FSELX)**
- **Sell Ford (F) buy Fidelity Select Utilities (FSUTX)**



May Return = -2.1%

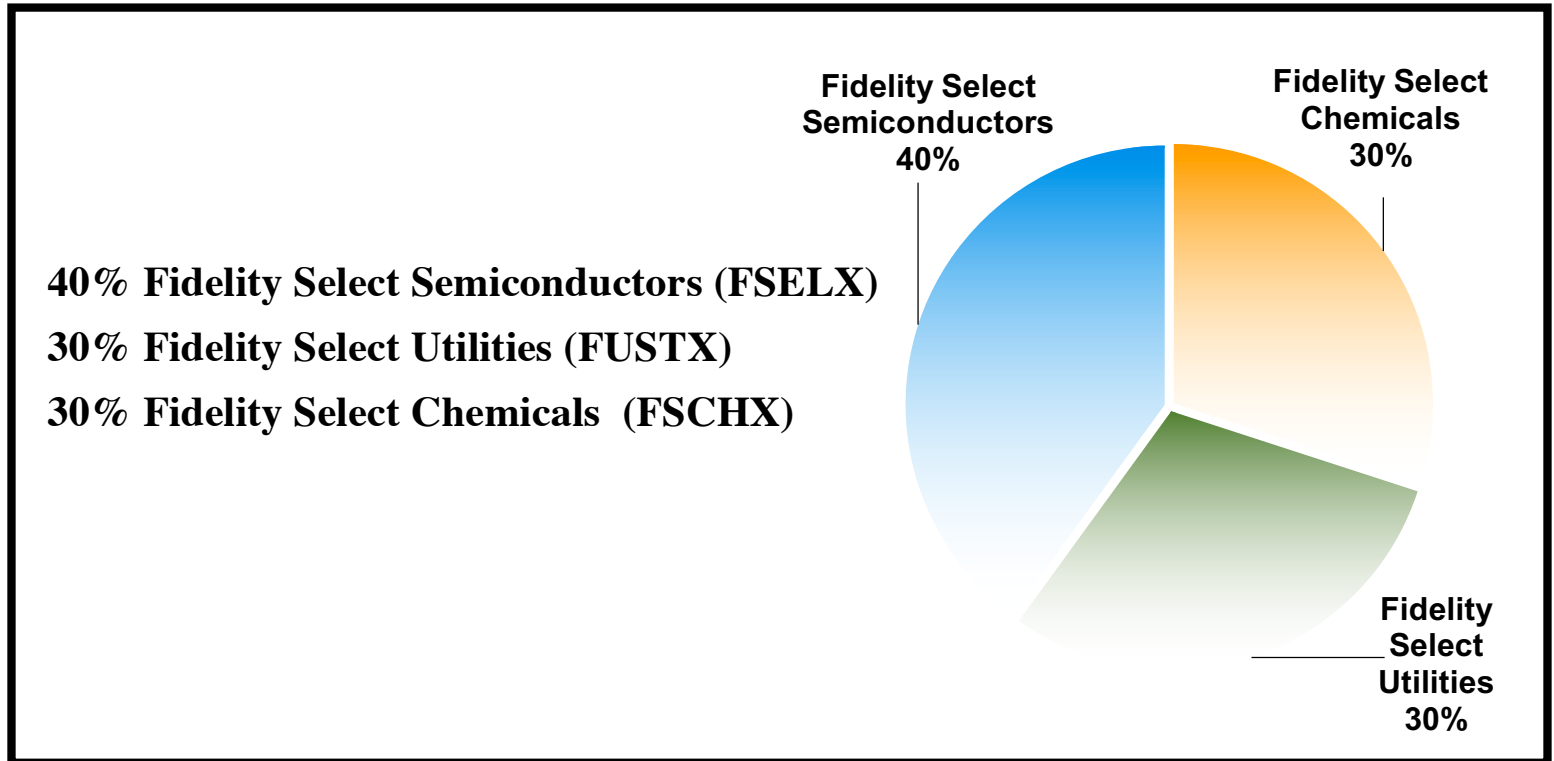
2015 YTD Return = -17.1%

2016 1st Quarter Return = -13.5%

15 year Average = 20.5%

Aggressive Growth Portfolio B: Accumulating Wealth: This is also very aggressive. It consists exclusively of Fidelity Select Funds. This portfolio could experience losses in a severe market decline. It's intended for very aggressive investors and due to its investment style this portfolio will remain fully invested in Fidelity Select Funds.

- **Transfer Fidelity Select Banking (FSRBX):** $\frac{1}{4}$ to **Fidelity Select Semiconductors (FSELX)** & $\frac{3}{4}$ to **Fidelity Select Utilities (FUSTX)**



May Return = 0.5%

2017 YTD Return = -1.8%

2017 1st Quarter Return = -1.1%

15 year Average = 17.6%