



Investing To Reach Your Goals Means
Gathering As Much Expertise
On Your Side As You Can

Looking at the long-term history of investing, one thing becomes absolutely clear: you have a better chance of achieving your goals if you invest broadly in markets and don't try to guess what specific stocks or sectors or even countries will do next. With this in mind, Loring Ward's Global Portfolios Series seek to put the broad-based power of global markets to work for investors. These seven portfolios are all:

- *Guided by 80+ Years of Academic and Behavioral Research*
- *Grounded in Vast Global Diversification*
- *Engineered, Monitored and Managed with Strict Discipline*

The Global Portfolio Series are guided by Loring Ward's Asset Class Investing philosophy, a passive investment approach based on the research of some of the academic community's most innovative and respected thinkers and economists. Rooted in the knowledge that asset allocation has the greatest impact on investment returns, it is designed to carefully control the investments included in each asset class, giving investors truer market returns than similar strategies.

The Global Portfolio Series are built with 9 asset class funds, offered by noted institutional money manager, Dimensional Fund Advisors, and typically include as many as 9000 Securities from 45 Countries, representing 35 Currencies.

With a 40% stock allocation dedicated to international markets, the portfolios in the Global Portfolio Series are designed for investors who are comfortable with international investing and its potential opportunities for diversification and long-term growth.

In addition, because value-oriented and small capitalization stocks have historically offered considerable potential for long-term growth (based on the amount of risk an investor is willing to take) the Global Portfolio Series features significant small cap and value allocations.

Finally, since trading, fees and expenses can have a real impact on performance, the portfolios in the Global Portfolio Series are designed and managed to help:

Keep Costs Low | Minimize Taxes | Control Risks

Your financial advisor will help you select and implement the right Global Portfolio for your particular situation. Working together you can build a strong investment foundation for your future.

Standard Performance Disclosure

Periodic Returns (%) as of February 28, 2014	1 Year	5 Year	10 Year	Since Inception	Inception Date
DFA Defensive	5.95	7.30	3.84	5.08	10/1/1996
DFA Conservative	9.44	10.11	4.72	5.76	10/1/1996
DFA Balanced	11.44	12.27	5.42	6.27	10/1/1996
DFA Moderate	14.96	15.70	6.17	6.86	10/1/1996
DFA Moderate Growth	17.13	18.02	6.80	6.51	4/16/1999
DFA Capital Appreciation	19.37	19.82	6.89	7.39	10/1/1996
DFA Equity	22.25	22.81	7.28	7.68	10/1/1996

Performance Information

The performance data quoted in this brochure represents past performance. Past performance does not guarantee future results and principal value will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance information quoted. To obtain current month end performance information please see your advisor. Investing in mutual funds involve risks, including the loss of principal.

Portfolio returns are the weighted average returns of the respective funds, rebalanced annually. Actual rebalancing may be different. The portfolio allocations are based on a Loring Ward model portfolio, which may not be suitable for all investors. It may not reflect the impact material economic and market factors might have had on decision making if clients' money were actually being managed at that time. The performance quoted reflects the reinvestment of dividends and capital gains distributions. Portfolio returns are after fund's internal expenses and Loring Ward's max investment management fee of 0.90%. Portfolio performance does not reflect the deduction of any fees charged by an independent investment advisor or other service provider to an individual account. Such fee, if taken into consideration, will reduce the performance quoted above. The model performance information reflects various allocation changes made over time. Therefore the underlying mutual funds used in calculating the portfolio performance may not represent the trailing returns of portfolios and/or the mutual funds currently available. For more information on the models, please refer to the DFA Global Fact Sheets.

Risk information

Stock investing involves risk including loss of principal. Securities of small companies are often less liquid than those of large companies. As a result, small company stocks may fluctuate relatively more in price.

International and emerging market investing involves special risks such as currency fluctuation and political instability, and may not be suitable for all investors. Bonds (fixed income) are subject to market and interest rate risk if sold prior to maturity.

Bond values will decline as interest rate rises, issuer's creditworthiness declines, and are subject to availability and changes in price.

REIT investments are subject to changes in economic conditions and real estate values, and credit and interest rate risks.

In performing portfolio services for client accounts, LWI Financial Inc. ("Loring Ward") may classify account assets into asset classes. In making this determination, Loring Ward may rely on outside sources, such as standard industry codes and research furnished by independent service providers. Loring Ward so determines the asset classes of securities in its sole discretion.

International markets involve additional risks, including, but not limited to, currency fluctuation, political instability, foreign taxes, and different methods of accounting and financial reporting. As a result, they may not be suitable investment options for everyone.

Diversification neither assures a profit nor guarantees against loss in a declining market.

Dimensional Fund Advisors is an investment advisor registered with the Securities and Exchange Commission and is unaffiliated with LWI Financial Inc.

Consider the investment objectives, risks, charges and expenses of the funds listed carefully before investing. The prospectus and if available, summary prospectus, contain this and other information about the funds. To obtain a DFA Funds prospectus, summary prospectus, additional information about the DFA Funds, or performance data current to the most recent month-end, please call Dimensional Fund Advisors collect at 512-306-7400; or visit www.dimensionalfund.com. Please read the prospectus and summary prospectus carefully before investing.

YOUR TOTAL WEALTH SOLUTION



DFA FUNDS
Global Portfolio
Series

DFA FUNDS GLOBAL PORTFOLIO SERIES

Model Performance Statistics

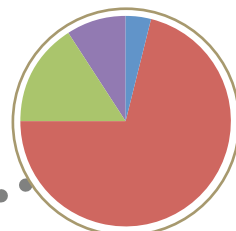
January 2000 – December 2013

Asset Growth
Asset Protection

Defensive

25% Stocks and 75% Bonds

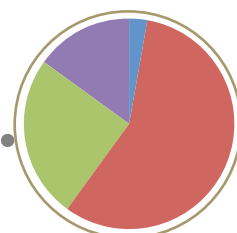
The objective of this portfolio is to provide capital preservation by investing in a portfolio of primarily bonds. It is designed for those who have a substantially lower tolerance for portfolio fluctuations. The investment time horizon is typically 3 years or more.



Conservative

40% Stocks and 60% Bonds

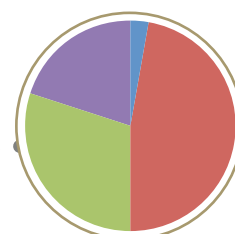
The objective of this portfolio is to provide capital preservation and limited growth by investing in a portfolio of primarily bonds with some stocks. It is designed for those who have a lower tolerance for portfolio fluctuations. The investment time horizon is typically 3 to 5 years or more.



Balanced

50% Stocks 50% Bonds

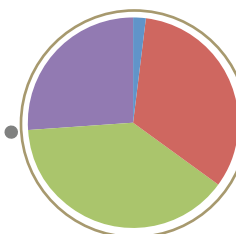
The objective of this portfolio is to provide a balance between capital preservation and growth. It is designed for those who have an average tolerance for portfolio fluctuations. The investment time horizon is typically 5 to 10 years or more.



Moderate

65% Stocks and 35% Bonds

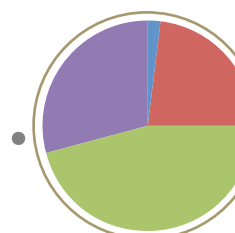
The objective of this portfolio is to provide some long-term growth by investing in both bonds and a greater allocation to stocks. It is designed for those who have a moderate tolerance for portfolio fluctuations. The investment time horizon is typically 10 to 15 years or more.



Moderate Growth

75% Stocks and 25% Bonds

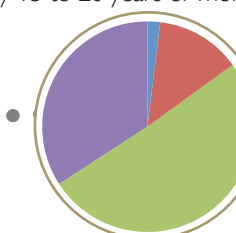
The objective of this portfolio is to provide moderate long-term growth. It is designed for those seeking growth and willing to assume a higher level of risk. These investors should have a long-term investment horizon and be able to withstand regular fluctuations in portfolio value. The investment time horizon is typically 10 to 20 years or greater.



Capital Appreciation

85% Stocks and 15% Bonds

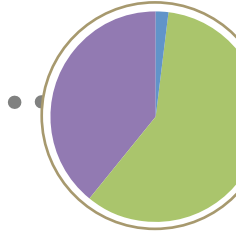
The objective of this portfolio is to provide long-term growth. It is designed for those interested in maximizing growth potential and willing to assume a higher level of risk to potentially achieve greater returns. These investors should have a long-term investment horizon and be able to withstand significant fluctuations in portfolio value. The investment time horizon is typically 15 to 20 years or more.



Equity

98% Stocks and 2% Cash

The objective of this portfolio is to maximize long-term growth potential. It is designed for those willing to assume a higher level of risk to potentially achieve greater returns. These investors should have a long-term investment horizon and be able to withstand sizable fluctuations in portfolio value. The investment time horizon is typically 20 years or more.



Potential Downside Risk⁵

	Defensive	Conservative	Balanced	Moderate	Moderate Growth	Capital Appreciation	Equity
Cash	4%	3%	3%	2%	2%	2%	2%
Fixed Income	71%	57%	47%	33%	23%	13%	0%
US Equity	16%	25%	30%	39%	46%	51%	59%
International Equity	9%	15%	20%	26%	29%	34%	39%
Annualized Return	4.29%	4.89%	5.36%	5.80%	6.22%	6.12%	6.24%
Annualized Real Return ¹	1.94%	2.54%	3.01%	3.45%	3.87%	3.76%	3.89%
Standard Deviation	4.62%	6.73%	8.43%	11.25%	13.13%	14.80%	17.46%
Best 1-year Return	18.41%	26.00%	32.92%	43.74%	51.65%	57.62%	68.85%
Worst 1-year Return	-13.22%	-20.15%	-25.34%	-33.67%	-38.87%	-43.27%	-50.01%
Best 5-year Annualized Return	7.41%	9.80%	11.82%	14.68%	16.91%	18.22%	20.94%
Worst 5-year Annualized Return	0.50%	-0.40%	-1.01%	-2.56%	-3.36%	-4.64%	-6.28%
Quarters Up	40	39	38	36	35	34	34
Quarters Down	16	17	18	20	21	22	22
Years Up	12	11	10	10	10	9	9
Years Down	2	3	4	4	4	5	5
# of Stocks ²	7865	10041	10041	10041	10041	10041	10041
# of Holdings ²	8203	10379	10379	10379	10379	10379	10041
# Countries ³	24	45	45	45	45	45	45
# of Currencies ³	15	35	35	35	35	35	35
Est. Lifetime Income Distribution ⁴	4.32%	4.54%	4.56%	4.62%	4.56%	4.44%	4.20%

¹Inflation is estimated using IA SBBI US Inflation Index | ²Estimates as of December 2013 | ³ Number of countries and currencies eligible for trading. Actual numbers may be different. | ⁴ Calculation based on Investment Planning Center Monte Carlo Simulation at 75% Confidence Level with 1% advisor fee. | ⁵Downside risk is the likelihood that an investment will decline in value, or the amount of loss that could result from that potential decline.
Data Source: Morningstar Direct, March 2014