



Insperity Retirement Services
 P.O. Box 1988
 Kingwood, TX 77347-1988

INSPERITY 401K PLAN

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Your Personal Retirement Performance Report

For the Period 10/01/24 Thru 12/31/24

PARTICIPANT INFORMATION

Personal Rate of Return for this Quarter - 2.48%

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IMPORTANT ACCOUNT INFORMATION

New year, new savings opportunity! For 2025, you can contribute up to \$23,500 if you're under 50, or \$31,000 if you're 50 or older. Plus, those aged 60-63 can now contribute up to \$34,750. Log in to Insperity Premier at portal.insperity.com to manage your rate. Questions? Call 866.715.3552, option 3.

ACTIVITY HIGHLIGHTS

CONTRIBUTIONS	CURRENT PERIOD	YEAR TO DATE
Total	\$0.00	\$0.00

SUMMARY	BEGINNING BALANCE	CONTRIBUTIONS & OTHER CREDITS	GAINS/ (LOSSES)	DISTRIBUTIONS & OTHER DEBITS	BALANCE ON 12/31/24	VESTED PERCENT	VESTED BALANCE
EMPLOYEE ROLLOVER	189,274.97	0.00	(4,048.72)	(30,979.43)	154,246.82	100.00%	154,246.82
EMPLOYEE PRE-TAX	19,622.32	0.00	(470.91)	(1.17)	19,150.24	100.00%	19,150.24
SAFE HARBOR MATCH	19,622.34	0.00	(470.91)	(1.18)	19,150.25	100.00%	19,150.25
Total	\$228,519.63	\$0.00	(\$4,990.54)	(\$30,981.78)	\$192,547.31		\$192,547.31

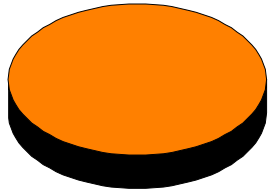
The Distributions & Other Debits column includes fees charged to your account, which are detailed in the Fee Information section of this statement.



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PERSONAL FUND BALANCE AND INVESTMENT INFORMATION

ALLOCATION BREAK OUT OF YOUR CURRENT INVESTMENTS



FUND TYPE/NAME

BALANCES ON 12/31/24

BALANCES AS % OF ASSETS

■	TARGET DATE	\$192,547.31	100.00%
	SSGA TARGET RETIRE 2045 FUND		
	TOTAL	\$192,547.31	100.00%

***** **IMPORTANCE OF DIVERSIFICATION** *****

To help achieve long-term retirement security, you should give careful consideration to the benefits of a well-balanced and diversified investment portfolio. Spreading your assets among different types of investments can help you achieve a favorable rate of return, while minimizing your overall risk of losing money. This is because market or other economic conditions that cause one category of assets, or one particular security, to perform very well often cause another asset category, or another particular security, to perform poorly. If you invest more than 20% of your retirement savings in any one company or industry, your savings may not be properly diversified. Although diversification is not a guarantee against loss, it can be an effective strategy to help you manage investment risk.

In deciding how to invest your retirement savings, you should take into account all of your assets, including any retirement savings outside of the Plan. No single approach is right for everyone because, among other things, individuals have different financial goals, different time horizons for meeting their goals, and different tolerances for risk.

It is also important to periodically review your investment portfolio, your investment objectives, and the investment options under the Plan to help ensure that your retirement savings will meet your retirement goals. The U.S. Department of Labor offers helpful information on investing and diversification through its Internet website at: <https://www.dol.gov/agencies/ebsa/laws-and-regulations/laws/pension-protection-act/investing-and-diversification>

INVESTMENT ACTIVITY

ACCOUNT ACTIVITY	BEGINNING BALANCE	CONTRIBUTIONS & OTHER CREDITS	GAINS/ (LOSSES)	DISTRIBUTIONS & OTHER DEBITS	FUND TRANSFERS	NUMBER OF SHARES	ENDING BALANCE
SSGA TARGET RETIRE 2045 FUND	228,519.63	0.00	(4,990.54)	(30,981.78)	0.00	11,299.7252	192,547.31
Total	\$228,519.63	\$0.00	(\$4,990.54)	(\$30,981.78)	\$0.00		\$192,547.31

INVESTMENT PERFORMANCE SUMMARY

FUND NAME	ACTUAL PERIODIC RETURN	YTD	1 YEAR	5 YEAR	10 YEAR/ LOF	AS OF
DODGE & COX STOCK X	-1.51	14.62	14.62	12.05	10.88	December 31, 2024
WILLIAM BLAIR SM CAP VAL FUND	-1.45	3.56	3.56	6.36	7.83	December 31, 2024
HARBOR SMALL CAP GROWTH RET	-2.84	9.46	9.46	8.69	9.70	December 31, 2024
HARTFORD SMALL CAP GR HLS IA	-1.02	13.12	13.12	5.84	7.89	December 31, 2024

Quoted data represents past performance and assumes dividends are reinvested. Past performance is not predictive of future results. Share price and return will vary, so investors may lose value or money, including principal. Investing for short periods may make losses more likely. Investments are not FDIC insured, nor are the deposits guaranteed by a bank or any other entity. See the fund's prospectus for general information on the fund. You should periodically review the objectives of each fund and determine whether or not these match your personal objectives and long-term goals.

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INVESTMENT PERFORMANCE SUMMARY

FUND NAME	ACTUAL PERIODIC RETURN	YTD	1 YEAR	5 YEAR	10 YEAR/ LOF	AS OF
METWEST TOTAL RETURN BND CL C	-3.75	0.98	0.98	-0.23	N/A	December 31, 2024
NY LIFE ANCHOR STABLE VAL FND	0.93	3.36	3.66	2.70	2.36	November 30, 2024
SSGA GLOBAL ALL CAP EX US IND	-7.69	5.11	5.11	4.27	5.15	December 31, 2024
SSGA RUSSELL SM MD CAP INDEX	4.23	17.10	17.10	10.24	9.67	December 31, 2024
SSGA S&P 500 INDEX FUND	2.41	25.01	25.01	14.50	13.08	December 31, 2024
SSGA US BOND INDEX FUND	-3.04	1.37	1.37	-0.32	1.36	December 31, 2024
VICTORY SYCAMORE EST VAL	-3.64	10.24	10.24	11.11	10.80	December 31, 2024
SSGA TARGET RETIRE INCOME FND	-1.72	6.94	6.94	4.38	4.45	December 31, 2024
SSGA TARGET RETIRE 2020 FUND	-1.74	7.18	7.18	4.88	5.42	December 31, 2024
SSGA TARGET RETIRE 2025 FUND	-1.92	8.62	8.62	5.93	6.41	December 31, 2024
SSGA TARGET RETIRE 2030 FUND	-2.28	10.02	10.02	6.76	7.06	December 31, 2024
SSGA TARGET RETIRE 2035 FUND	-2.49	10.68	10.68	7.20	7.45	December 31, 2024
SSGA TARGET RETIRE 2040 FUND	-2.46	11.45	11.45	7.67	7.81	December 31, 2024
SSGA TARGET RETIRE 2045 FUND	-2.40	12.05	12.05	8.07	8.13	December 31, 2024
SSGA TARGET RETIRE 2050 FUND	-2.31	12.64	12.64	8.40	8.30	December 31, 2024
SSGA TARGET RETIRE 2055 FUND	-2.27	12.79	12.79	8.44	8.33	December 31, 2024
SSGA TARGET RETIRE 2060 FUND	-2.27	12.79	12.79	8.44	N/A	December 31, 2024
SSGA TARGET RETIRE 2065 FUND	-2.27	12.80	12.80	N/A	N/A	December 31, 2024
T ROWE BLUE CHIP GROWTH CL T7	9.21	36.92	41.59	15.58	15.12	November 30, 2024
AMERICAN FDS EUROPAC GR R6	-7.03	5.04	5.04	3.95	5.66	December 31, 2024
PIMCO INCOME INSTL	-0.97	5.42	5.42	2.89	4.27	December 31, 2024
NUVEEN SMALL CAP VALUE R6	1.99	15.02	15.02	8.02	7.04	December 31, 2024
PIMCO ALL ASSET INST	-3.43	4.12	4.12	4.61	4.65	December 31, 2024
T ROWE PRICE MID-CAP GROWTH I	-0.16	9.54	9.54	7.92	10.37	December 31, 2024

FEE INFORMATION

The following fees were charged to your Plan account for the quarter being reported.

Fee Type	Amount	Description
ADMINISTRATIVE	11.78	Plan Administrative Fee
DISTRIBUTION	50.00	Distribution/Withdrawal Fee
OVERNIGHT	50.00	Check Expediting Service Fee
Total	111.78	

In addition, some of the Plan's administrative expenses for the quarter being reported, including legal, accounting and recordkeeping expenses, were paid from the total annual operating expenses of one or more of the Plan's investment options (e.g. through revenue sharing arrangements, Rule 12b-1 fees and/or sub transfer agency fees).

Please visit <http://www.investmentterms.com> for a glossary of investment terms relevant to the investment options under the Plan. The glossary is intended to help you better understand your options.

Quoted data represents past performance and assumes dividends are reinvested. Past performance is not predictive of future results. Share price and return will vary, so investors may lose value or money, including principal. Investing for short periods may make losses more likely. Investments are not FDIC insured, nor are the deposits guaranteed by a bank or any other entity. See the fund's prospectus for general information on the fund. You should periodically review the objectives of each fund and determine whether or not these match your personal objectives and long-term goals.

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