



Symbol	Name
AMZN	AMAZON COM INC
BINC	ISHARES FLEXIBLE INCOME ACTIVE ETF
BUFR	FIRST TR EXCHNG TRADED FD VIII FT VEST
CGCP	CAPITAL GROUP CORE PLUS INCOME CREATION
CVS	CVS HEALTH CORPORATION COM
CVX	CHEVRON CORP NEW
CASH	
FCX	FREEMPORT-MCMORAN INC
FDEC	FIRST TR EXCHNG TRADED FD VIII FT CBOE E
FENI	FIDELITY COVINGTON TRUST ENHANCED INTL
FERG	FERGUSON PLC NEW COMMON STOCK NEW
GOOG	ALPHABET INC CAP STK CL C
IEF	ISHARES BARCLAYS 7-10 YEAR TREASURY BOND
NBTB	NBT BANCORP INC
NRG	NRG ENERGY INC COM NEW
OKTA	OKTA INC CL A
OMFL	INVESCO EXCH TRD SLF IDX FD TR RUSL 1000
RSP	INVESTCO EXCHANGE TRADED FD TR S&P 500 E
SIEGY	SIEMENS A G
UBER	UBER TECHNOLOGIES INC COM
WMT	WAL MART INC
XLU	STATE STREET UTILITIES SELECT SECTOR SPD
ZM	ZOOM COMMUNICATIONS INC CL A

Moderate Portfolio Sample Positions as of 4-2-26. For informational purposes only and subject to change. The positions and target weights for this portfolio are as of 4-2-26 and are subject to change. The primary purpose of showing sample investments is for informational purposes and should not be considered as an offer to buy or sell any security. For further information about our process, please email support@dollarinvestmentclub.com or contact Leigh Baldwin at 315-655-2964.

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