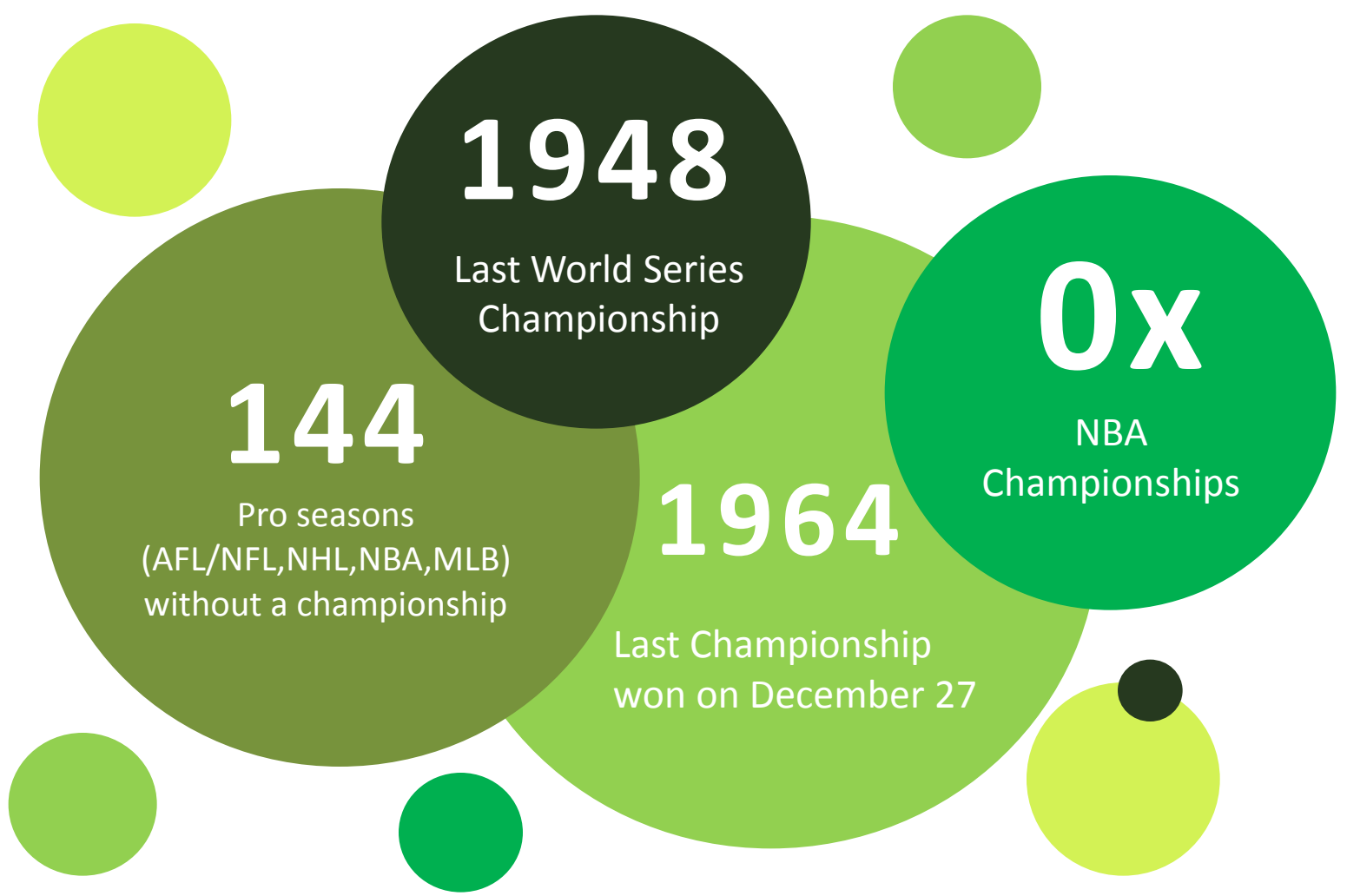
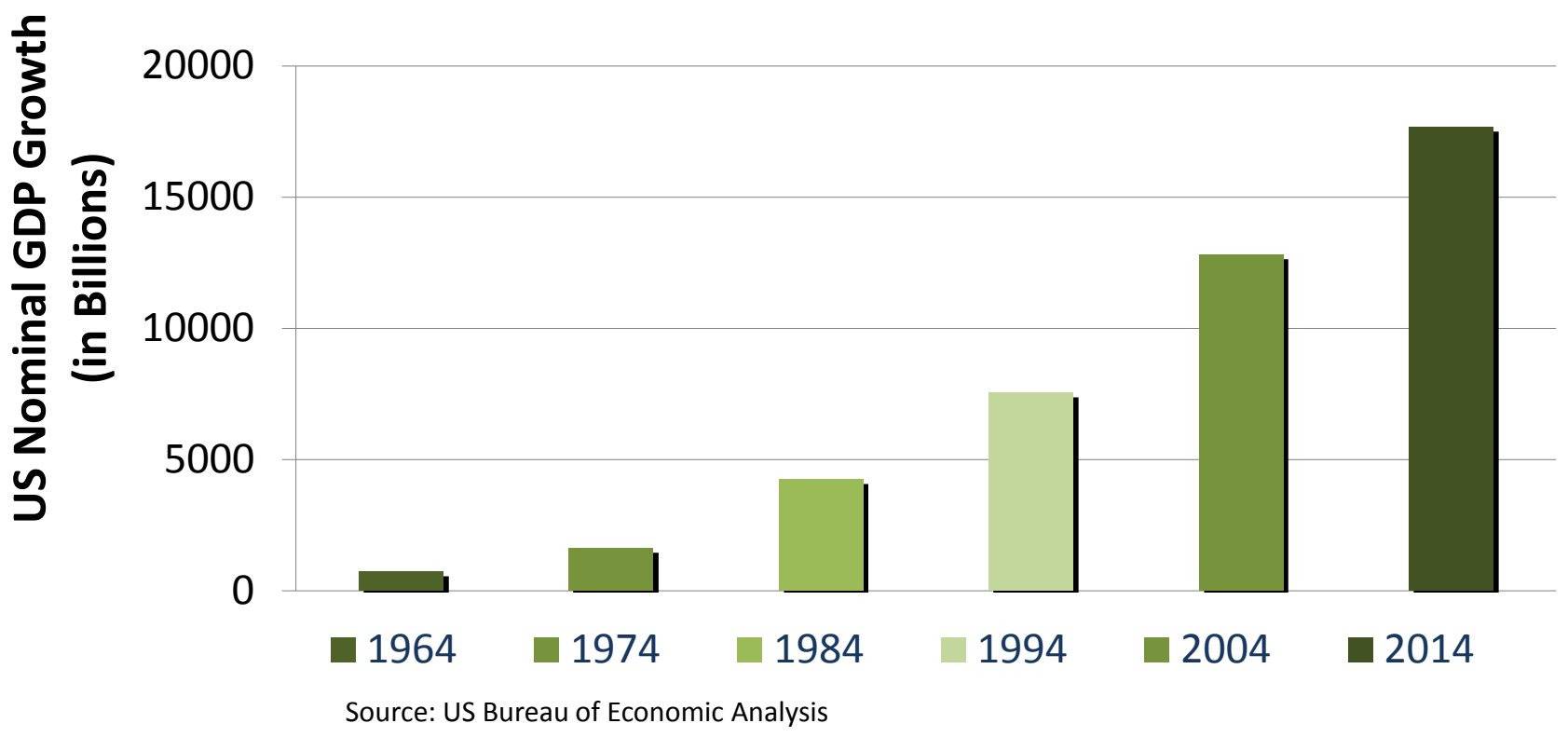


# Economic & Financial Changes Since Cleveland's Last Title



## U.S. Nominal GDP Growth Since 1964



**1980** **First 401(k) Plan was created**

**72,224** **Total number of CFP® Certificates**

**Roth IRA was established by the Taxpayer Relief Act of 1997**

**88** **Open End Mutual funds today have a track record dating back to 12/27/1964**

**1974** **Congress passed Employee Retirement Income Security Act that began Individual Retirement Accounts**

**6** **Companies (GE, Exxon, P&G, DuPont, United Technologies, Chevron) listed in the Dow Jones Industrial Average today were also listed in 1964**

**11** **Calendar years that S&P 500 Index produced a negative return**

**37.6%** **The highest annual calendar year return of the S&P Index**

## Growth of \$1 since 1964

