Total Strategy Account

One Account…
Many Solutions

Total Strategy Account is an innovative investment management program that allows you to bring your investments together in one account, receive professional money management, strategic tax management services, and consolidated reporting — all for one fee, based on the value of your account.

A Disciplined Investment Process

Selecting investment managers and asset classes that are most appropriate for your situation and goals is fundamental to a successful investment strategy. Your financial advisor brings the experience, insight and breadth of resources required to present you with personalized investment recommendations.

A Personalized Portfolio

You'll have access to a variety of investments, including:

- Professional Money Managers
- Mutual Funds
- Exchange Traded Funds (ETFs)

Furthermore, you'll have the flexibility to select or build a portfolio that is most appropriate for you. With Total Strategy Account, you may choose a pre-selected investment allocation model, modify it to suit your needs, or build your own from the wide range of available investments.

A Simplified Approach

You'll reap the benefits of having your investments located in one, centralized account:

- *Diversification in One Account* — With Total Strategy Account, once you select your money manager, you can add mutual funds and ETFs, all in one account, which once required opening several accounts.
- *Automatic Rebalancing* — Inherent to your Total Strategy Account is a disciplined rebalancing process, which is implemented across all investments in your portfolio.
- *Tax Management Services* — By monitoring for wash sales and short-term gain exposure, we are able to identify opportunities to improve tax efficiency.
- *Consolidated In-Depth Reporting* — Total Strategy Account allows you to implement an asset allocation strategy in one account, so you will receive only one consolidated monthly statement, one consolidated quarterly portfolio review and one tax statement. By consolidating each asset class in the same account, it's easier to review your investments' progress as an overall portfolio.
- *Simplified Account Opening Process* — Instead of completing paperwork for each investment, you need only complete one straightforward Investor Profile and one contract for your entire portfolio.

You are focused on your long-term investment success. Your financial advisor specializes in identifying, anticipating, and delivering customized investment solutions to you, the sophisticated investor.

To learn how Total Strategy Account can help you meet your long-term financial needs, contact your financial advisor today.

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Our firm does not provide tax or legal advice. All decisions regarding the tax implications of your investments should be made in connection with your independent tax or legal advisor.

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