

# LIBERTY PORTFOLIOS™

COMPREHENSIVE INVESTMENT STRATEGIES



Freedom Capital  
Management Strategies®



CONSTRUCTED WITH VISION.  
MANAGED WITH PURPOSE.  
LEADERSHIP TO PURSUE  
YOUR DREAMS.

# LIBERTY PORTFOLIOS™

Liberty Portfolios™ are comprehensive investment solutions designed to meet the uniquely important asset management needs of investors across the key phases of financial planning - accumulation, growth and income, and income.

These comprehensive investment strategies deliver a combination of active management, modern diversification, and risk mitigation by integrating three core elements of asset management: Freedom Foundation®, Freedom Dynamic®, and Freedom Alternative®.



**ACCUMULATION  
SERIES**



**GROWTH & INCOME  
SERIES**



**INCOME  
SERIES**



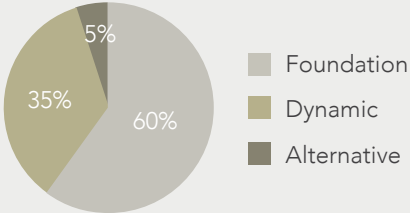
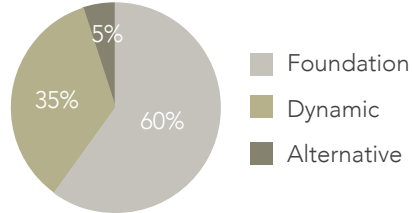
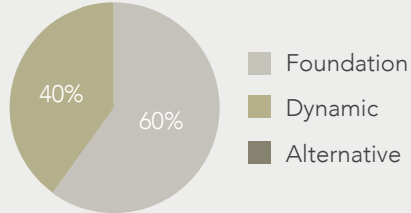
**REAL INCOME  
SERIES**



# ACCUMULATION SERIES

The Accumulation Series of Freedom Capital Management Strategies® is designed for investors in the accumulation phase of financial planning. The investment strategies available through the Accumulation Series are appropriate for investors seeking to grow and compound their investable assets over the long term and who have minimal need for current income.

These investment strategies are predominantly invested in equity-oriented securities and typically exhibit volatility levels comparable to global equity markets. The Accumulation Series is intended for investors who: have a long-term investment horizon; seek to grow their investable assets; and have a moderate plus to high risk tolerance.

AGGRESSIVE ACCUMULATION	GROWTH ACCUMULATION	RISK MITIGATED ACCUMULATION
<p><b>Objective:</b> Maximum long term growth and appreciation of investable assets.</p> <p><b>Potential FCMS Element Mix</b></p>  <p><b>Expected Asset Allocation Ranges</b></p> <p>Equity: 75% ←→ 100%</p> <p>Fixed Income: 0% ←→ 25%</p> <p>Alternative: 0% ←→ 20%</p>	<p><b>Objective:</b> Long term growth and appreciation of investable assets.</p> <p><b>Potential FCMS Element Mix</b></p>  <p><b>Expected Asset Allocation Ranges</b></p> <p>Equity: 60% ←→ 85%</p> <p>Fixed Income: 15% ←→ 40%</p> <p>Alternative: 0% ←→ 20%</p>	<p><b>Objective:</b> Risk mitigated long term growth and appreciation of investable assets.</p> <p><b>Potential FCMS Element Mix</b></p>  <p><b>Expected Asset Allocation Ranges</b></p> <p>Equity: 20% ←→ 100%</p> <p>Fixed Income: 0% ←→ 80%</p> <p>Alternative: 0% ←→ 20%</p>

# GROWTH & INCOME SERIES



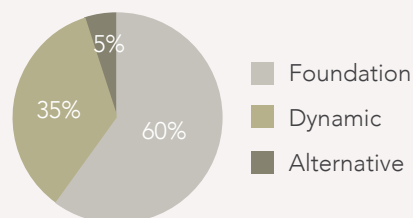
The Growth & Income Series of Freedom Capital Management Strategies® is designed for investors in the growth and income phase of financial planning. The investment strategies available through the Growth & Income Series are appropriate for investors seeking a combination of growth potential and current income generation from their investable assets.

These strategies invest in a combination of equity, fixed income, and alternative assets, and typically exhibit moderate levels of volatility. The Growth & Income Series is intended for investors who: have a long-term investment horizon; seek a combination of long-term growth and current income from their investable assets; and have a moderate to moderate plus risk tolerance.

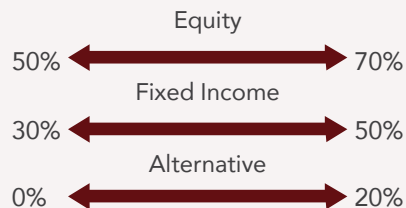
## MODERATE PLUS GROWTH & INCOME

Objective:  
Moderate long term growth and current income.

Potential FCMS Element Mix



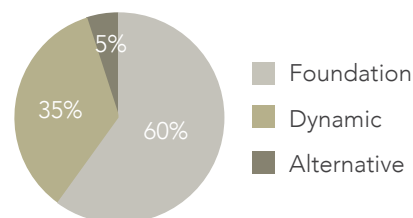
Expected Asset Allocation Ranges



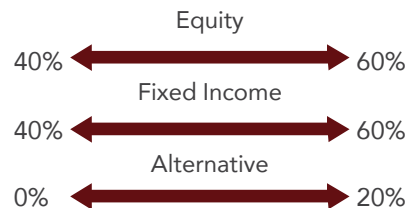
## BALANCED GROWTH & INCOME

Objective:  
Balance of long term growth and current income.

Potential FCMS Element Mix



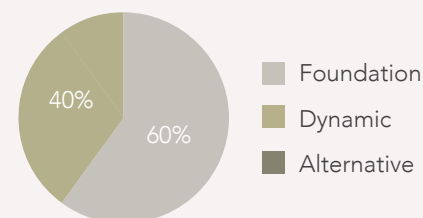
Expected Asset Allocation Ranges



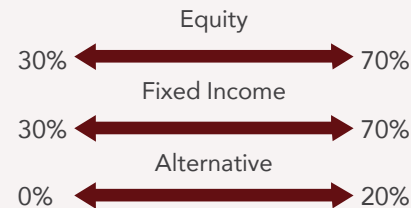
## RISK MITIGATED GROWTH & INCOME

Objective:  
Risk mitigated long term growth and current income.

Potential FCMS Element Mix



Expected Asset Allocation Ranges





# INCOME SERIES

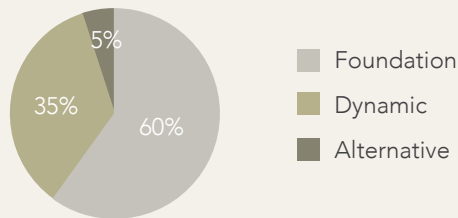
The Income Series of Freedom Capital Management Strategies® is designed for investors in the income phase of financial planning. The investment strategies available through the Income Series are appropriate for investors seeking a conservatively structured portfolio and consistent current income.

These strategies are predominantly invested in fixed income securities that have historically demonstrated lower levels of volatility compared to global equity markets. The Income Series is intended for investors who: have an intermediate to long-term investment horizon, seek stability and consistent income from their investable assets, and have a conservative to moderate risk tolerance.

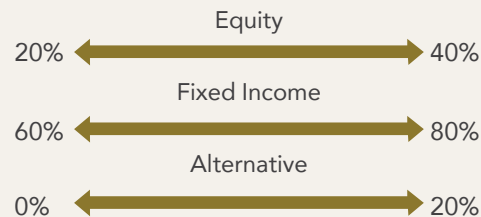
## MODERATE INCOME

**Objective:**  
Moderate current income generated from a diversified portfolio of yielding investments.

### Potential FCMS Element Mix



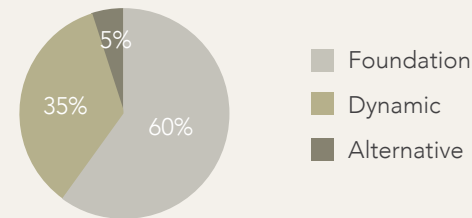
### Expected Asset Allocation Ranges



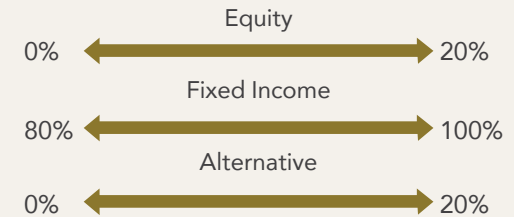
## CONSERVATIVE INCOME

**Objective:**  
Consistent current income from a conservatively structured portfolio.

### Potential FCMS Element Mix



### Expected Asset Allocation Ranges



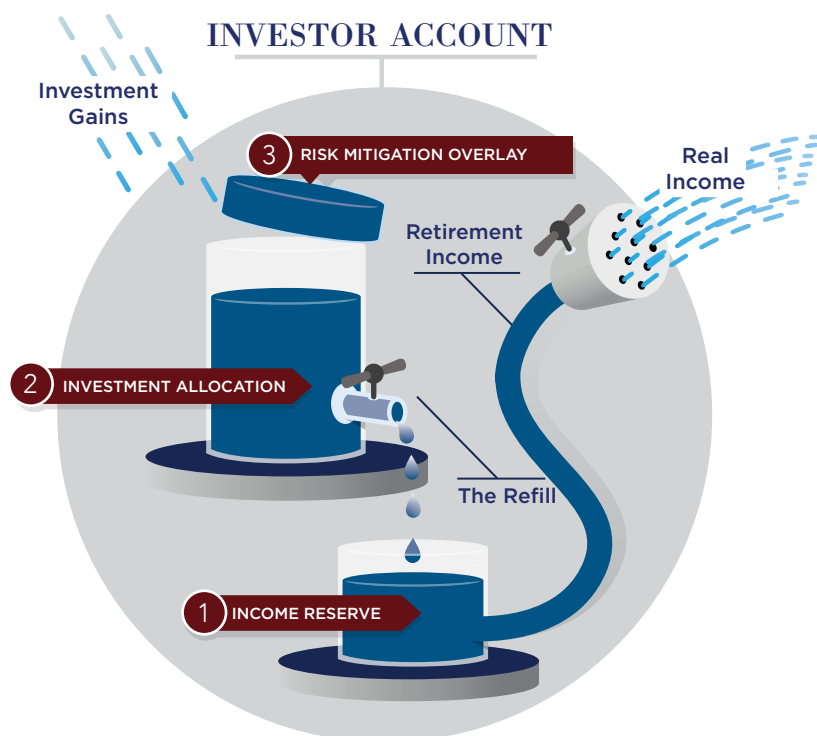
# REAL INCOME SERIES

The Real Income Series of Freedom Capital Management Strategies® is designed for investors seeking long-term income from their investable assets. This investment strategy combines three components: Income Reserve, Investment Allocation, and Risk Mitigation Overlay. These three components are dynamically managed through a multi-disciplined investment process in an effort to minimize the risk of an investor "outliving their money" while providing inflation-adjusted withdrawals throughout retirement.

## REAL INCOME OPTIONS

REAL INCOME RATE	TARGET INVESTMENT ALLOCATION	PROJECTED REAL MONTHLY INCOME <sup>1</sup>	
		YEAR 1	YEAR 20
4%	70% Equity 30% Fixed Income	\$3,333	\$5,845
5%	80% Equity 20% Fixed Income	\$4,167	\$7,306
6%	90% Equity 10% Fixed Income	\$5,000	\$8,768

<sup>1</sup>The example above shows how distribution amounts would be adjusted considering 3% inflation of a \$1,000,000 initial investment over a 20-year time period.



- 3 RISK MITIGATION OVERLAY**  
A hedging strategy that seeks to protect the Investment Allocation from catastrophic market risk.
- 2 INVESTMENT ALLOCATION**  
A portfolio of growth assets constructed to fund future retirement income.
- 1 INCOME RESERVE**  
A multi-year liquidity reserve set aside to fund near term income.





*Securities*  
Founders Financial Securities, LLC

Founders products are subject to risk including general market risk, currency fluctuations, and economic conditions. The underlying investments of Founders products fluctuate in price and may be sold at a price lower than the purchase price resulting in a loss of the client's principal. Investment Advisory Services and Securities offered through Founders Financial Securities, LLC. Member FINRA, SIPC and Registered Investment Advisor.

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