



FCMS
Freedom Capital Management Strategies®

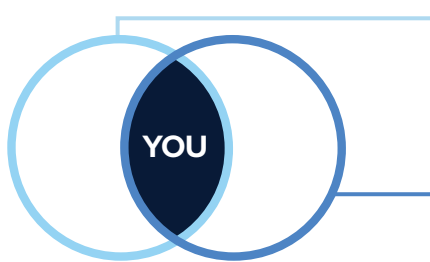
LIBERTY PORTFOLIOS™
*Connecting Your Wealth to
Your Goals and Dreams*



OUR INVESTMENT PLATFORM

FCMS® is an innovative platform delivering personalized investment solutions to connect your wealth to your goals and dreams

YOUR TEAM



Financial Advisor

Provides professional leadership through a dynamic, collaborative planning process designed to serve your evolving needs through your financial journey

Investment Committee

Performs the rigorous research and due diligence necessary to manage your portfolio amid increasingly complex financial markets

OUR INVESTMENT PHILOSOPHY

› Active Oversight

We actively manage your portfolio amid ever-changing markets and collaborate with you to ensure your investments remain aligned to your goals and dreams.

› Modern Diversification

We offer a diversified suite of investment solutions that integrate traditional principles of investment theory with an innovative approach to portfolio construction.

› Risk Management

Based on your unique financial situation and risk tolerance, we actively manage risk through asset allocation, diversification, and innovative risk mitigation tools.

OUR INVESTMENT PROCESS

The increasingly complex capital markets of today require a disciplined investment process that is grounded in rigorous, objective due diligence and has the capacity to adapt as markets evolve over time.

Our team takes a process-driven approach designed to ensure your investment portfolio is continually monitored and managed in alignment with your goals and dreams.



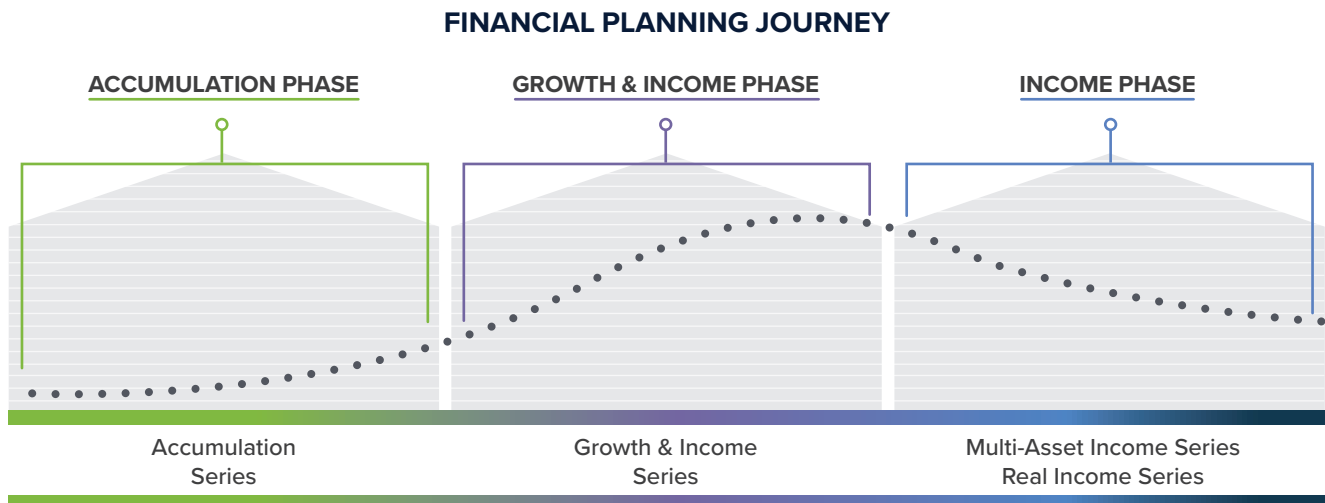
LIBERTY PORTFOLIOS™

Comprehensive investment solutions for your financial planning journey

ALIGNED TO YOUR FINANCIAL PLAN

Each Liberty Portfolio is a holistic investment strategy aligned with a specific phase of your financial planning journey.

These outcome-focused portfolios are managed to achieve your investment objectives while offering varying degrees of portfolio risk based on your personal preference.



COMPREHENSIVE INVESTMENT SOLUTIONS

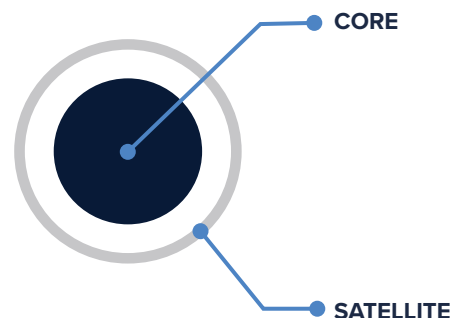
Liberty Portfolios are constructed through a **core** and **satellite** approach that provides for enhanced diversification by integrating multiple investment methodologies.

› CORE

The core allocation is designed to provide broadly diversified exposure to global capital markets in an efficient, cost-effective manner.

› SATELLITE

The satellite allocation supplements the core allocation with a selection of high-conviction, actively-managed funds that offer diversification benefits and improved risk-adjusted return potential over the long term.



ACCUMULATION SERIES



INVESTOR PROFILE

Financial Planning Phase: Accumulation

Investment Objective: To grow and compound investable assets over the long term through an equity-centric portfolio



CORE

Provides broadly diversified exposure to global equity markets in an efficient, cost-effective manner and a more limited allocation to fixed income markets when deemed appropriate



SATELLITE

A selection of high-conviction, actively-managed equity funds that offers diversification benefits and improved risk-adjusted return potential over the long term

PORTFOLIO	EXPECTED RISK SCORE*	TARGET ASSET ALLOCATION		
AGGRESSIVE ACCUMULATION	80	Core Equity 60%	Core Fixed Income 0%	Satellite Accumulation 40%
GROWTH ACCUMULATION	70	Core Equity 45%	Core Fixed Income 15%	Satellite Accumulation 40%
RISK MITIGATED ACCUMULATION	60	Core Equity 45%	Core Fixed Income 15%	Satellite Risk Mitigated Equity 40%

*Please see disclosure on last page.

GROWTH & INCOME SERIES

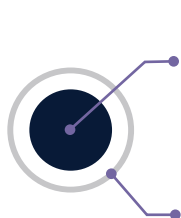
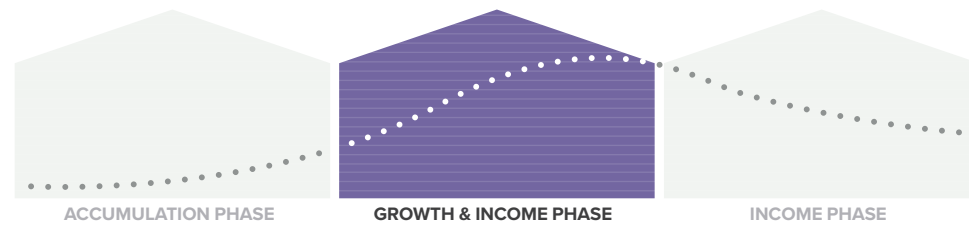


INVESTOR PROFILE

Financial Planning Phase: Growth & Income

Investment Objective: To produce a combination of long-term capital appreciation potential and current income through a diversified portfolio of equities and fixed income

FINANCIAL PLANNING JOURNEY



CORE

Provides broadly diversified exposure to global equity and fixed income markets in an efficient, cost-effective manner

SATELLITE

A selection of high-conviction, actively-managed funds that seek to generate long-term growth potential and current income by allocating to dividend-paying stocks, real estate, preferred stocks, convertible bonds, and fixed income

PORTFOLIO	EXPECTED RISK SCORE*	TARGET ASSET ALLOCATION		
MODERATE GROWTH & INCOME	65	Core Equity 40%	Core Fixed Income 25%	Satellite Growth & Income 35%
BALANCED GROWTH & INCOME	55	Core Equity 30%	Core Fixed Income 35%	Satellite Growth & Income 35%
RISK MITIGATED GROWTH & INCOME	45	Core Equity 30%	Core Fixed Income 30%	Satellite Risk Mitigated Equity 40%

*Please see disclosure on last page.

MULTI-ASSET INCOME SERIES



INVESTOR PROFILE

Financial Planning Phase: Income

Investment Objective: To generate current income through a diversified portfolio of income-producing investments



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- CORE**
Provides broadly diversified exposure to core fixed income markets in an efficient, cost-effective manner
 - SATELLITE**
A selection of high-conviction, actively-managed funds that seek to generate current income by allocating to income-producing assets across credit and equity markets:
 - **Credit:** high-yield bonds, emerging market debt, securitized debt, preferred securities
 - **Equity:** dividend-paying stocks, real estate, covered calls

PORTFOLIO	EXPECTED RISK SCORE*	TARGET ASSET ALLOCATION		
AGGRESSIVE INCOME	45	Core Fixed Income 20%	Satellite Credit Income 50%	Satellite Equity Income 30%
MODERATE INCOME	35	Core Fixed Income 40%	Satellite Credit Income 35%	Satellite Equity Income 25%
CONSERVATIVE INCOME	25	Core Fixed Income 60%	Satellite Credit Income 25%	Satellite Equity Income 15%

*Please see disclosure on last page.

REAL INCOME™ SERIES

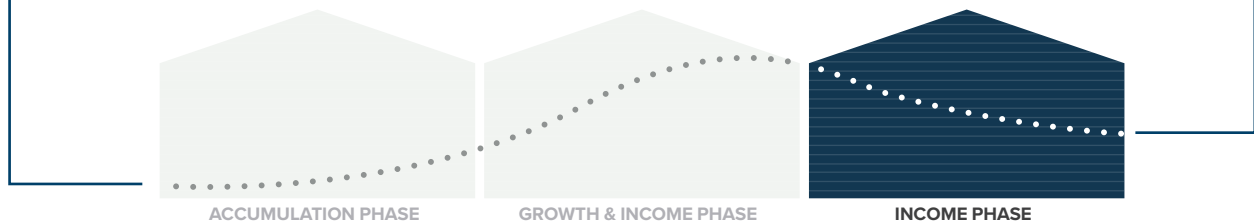


INVESTOR PROFILE

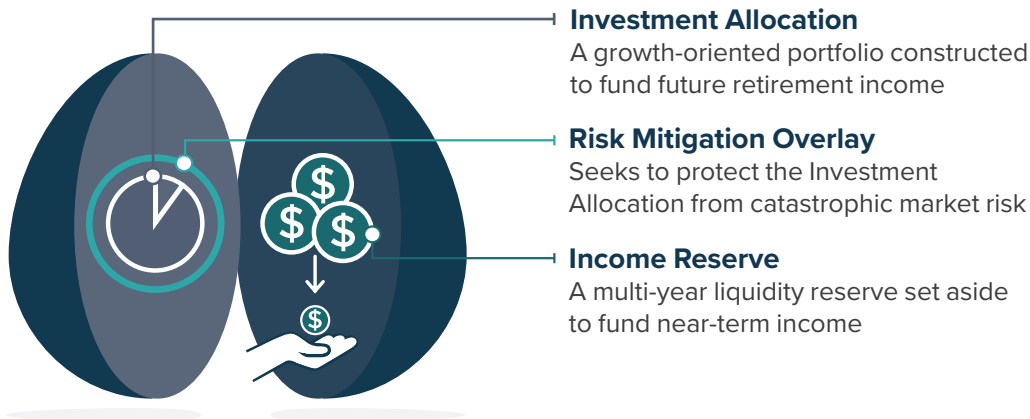
Financial Planning Phase: Income

Investment Objective: To deliver long-term, inflation-adjusted income through an equity-based portfolio

FINANCIAL PLANNING JOURNEY



COMPONENTS OF THE REAL INCOME STRATEGY



PORTFOLIO	EXPECTED RISK SCORE*	DESCRIPTION	TARGET ASSET ALLOCATION
REAL INCOME 4%	55	An equity-based strategy designed to support a 4% annual income distribution that grows with inflation	62% Equity 26% Fixed Income 12% Income Reserve
REAL INCOME 5%	60	An equity-based strategy designed to support a 5% annual income distribution that grows with inflation	68% Equity 17% Fixed Income 15% Income Reserve
REAL INCOME 6%	65	An equity-based strategy designed to support a 6% annual income distribution that grows with inflation	74% Equity 8% Fixed Income 18% Income Reserve

The Real Income™ retirement income strategy is NOT A GUARANTEE against market loss and there is no guarantee that the Real Income™ strategy chosen by an investor will lead to successful investment outcomes for part of, or for the entirety of an investor's retirement. This strategy is not an insurance product with payments guaranteed. It is a strategy that invests in marketable securities, any of which will fluctuate in value. Before investing, consider the investment objectives, risks, charges, and expenses of the strategy.

*Please see disclosure on last page.



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In addition, the Investor should make an independent assessment of the legal, regulatory, tax, credit, and accounting and determine, together with their own professional advisers if any of the investments mentioned herein are suitable to their personal goals. Investors should ensure that they obtain all available relevant information before making any investment. It should be noted that the value of investments and the income from them may fluctuate in accordance with market conditions and taxation agreements and investors may not get back the full amount invested.

Both past performance and yield may not be a reliable guide to future performance. Exchange rate variations may cause the value of investments to increase or decrease. Investments in smaller companies may involve a higher degree of risk as they are usually more sensitive to market movements. Investments in emerging markets may be more volatile and therefore the risk to your capital could be greater. Further, the economic and political situations in emerging markets may be more volatile than in established economies and these may adversely influence the value of investments made.

*Expected Risk Score

The expected risk scores contained herein represent the estimated Risk Number® of each strategy based on its historical asset allocation and volatility; Risk Numbers are included for informational purposes only and are subject to change.

The Risk Number® is a proprietary scaled index developed by Riskalyze to reflect a “risk score,” whereby the higher the Risk Number the higher the investment risk and potential downside risk of the underlying portfolio. Thus, a portfolio with a Risk Number of “55” generally has more risk than a portfolio with a Risk Number of “45.” However, two portfolios with a “45” Risk Number can be comprised of different holdings to derive that same Risk Number. Any content or information provided by Riskalyze is provided “AS IS” for informational purposes only and do not constitute investment advice or an investment recommendation offered by Riskalyze.

