

# »» FLEX QUICK MODEL REFERENCE GUIDE ««

	Classic	AMP	TAP	Flagships	Alternatives	MPD	Specialized MPDs
Type	ETF	Mutual Funds	ETF	Stocks	Funds	Blends	Blends
Style	Strategic	Strategic	Tactical	Equity	Alternative	Multi-Asset	Focused Strategy
Riskalyze: 2Os	<ul style="list-style-type: none"> <li>· Bond</li> <li>· Total Return</li> </ul>	Income					Inflation Protected Series <ul style="list-style-type: none"> <li>· Conservative</li> <li>· Moderate</li> <li>· Moderate Growth</li> </ul>
Riskalyze: 3Os	Income + Growth	Total Return	Conservative		Liquid Alt Income		
Riskalyze: 4Os	Conservative	Income + Growth			<ul style="list-style-type: none"> <li>· GM Conservative</li> <li>· GM Core</li> </ul>	<ul style="list-style-type: none"> <li>· Total Return</li> <li>· Conservative</li> <li>· Income + Growth</li> </ul>	
Riskalyze: 5Os	Balanced	Conservative	US High Yield		<ul style="list-style-type: none"> <li>· Global Macro Growth</li> <li>· Liquid Alt Diversified</li> <li>· Liquid Alt Growth</li> </ul>	<ul style="list-style-type: none"> <li>· Balanced</li> <li>· Stratactical Conservative</li> </ul>	<ul style="list-style-type: none"> <li>· MPD Custom High Income</li> <li>· MPD Custom High Income and Growth</li> <li>· MPD Custom High Income and Growth with Overlay</li> </ul>
Riskalyze: 6Os	Growth	<ul style="list-style-type: none"> <li>· Balanced</li> <li>· Growth</li> </ul>				<ul style="list-style-type: none"> <li>· Growth</li> <li>· Global Growth</li> </ul>	<ul style="list-style-type: none"> <li>· TAP Overlay Solutions</li> <li>· Traditional Values Portfolio (faith-based)</li> <li>· Trek Wealth Series</li> </ul>
Riskalyze: > 7Os	Aggressive Growth	Aggressive Growth	<ul style="list-style-type: none"> <li>· 1X</li> <li>· Complete</li> <li>· Global</li> <li>· 2X</li> </ul>	<ul style="list-style-type: none"> <li>· Equity</li> <li>· Dividend</li> <li>· Global</li> <li>· Large Value</li> <li>· International</li> <li>· Small-Cap</li> </ul>		<ul style="list-style-type: none"> <li>· Aggressive Growth</li> <li>· Stratactical Balanced</li> <li>· Stratactical Growth</li> </ul>	
Target Min	\$15,000	\$25,000	\$25,000	\$50,000	\$25,000	\$250,000	\$250,000

*Excludes additional SMA/UMA fees, investment management fees and Adhesion platform fees, if applicable. This material is for information purposes only and is not intended as an offer or solicitation with respect to the purchase or sale of any security. No investment strategy can guarantee a profit or protect against loss in periods of declining values. Past performance does not guarantee future results. Consult your financial professional before making any investment decision. For illustrative use only.*