

# >> FLEX QUICK MODEL REFERENCE GUIDE <<

Goals	TOTAL RETURN			RISK MANAGED		INCOME	CAPITAL PRESERVATION
Models	Classic	AMP	Flagships	Alternatives	MPD	Specialized MPDs	TAP
Type	ETF	Mutual Funds	Stocks	Funds	Blends	Blends	ETF
Style	Strategic	Strategic	Equity	Alternative	Multi-Asset	Focused Strategy	Tactical
Riskalyze: 2Os	· Bond · Total Return	Income				Inflation Protected Series · Conservative · Moderate · Moderate Growth	
Riskalyze: 3Os	Income + Growth	Total Return		Liquid Alt Income			Conservative
Riskalyze: 4Os	Conservative	Income + Growth		· GM Conservative · GM Core	· Total Return · Conservative · Income + Growth		
Riskalyze: 5Os	Balanced	Conservative		· Global Macro Growth · Liquid Alt Diversified · Liquid Alt Growth	· Balanced · Stratactical Conservative	· MPD Custom High Income · MPD Custom High Income and Growth · MPD Custom High Income and Growth with Overlay	US High Yield
Riskalyze: 6Os	Growth	· Balanced · Growth			· Growth · Global Growth		· TAP Overlay Solutions · Traditional Values Portfolio (faith-based)
Riskalyze: > 7Os	Aggressive Growth	Aggressive Growth	· Equity · Dividend · Global · Large Value · International · Small-Cap		· Aggressive Growth · Stratactical Balanced · Stratactical Growth		· 1X · Complete · Global · 2X
Target Min	\$15,000	\$25,000	\$25,000	\$25,000	\$250,000	\$250,000	\$50,000
Fund Expense Range (bps)	20-30s	50-90s	SMA	25-80s	40-70s	20-40s	10-100s

Excludes additional SMA/UMA fees, investment management fees and FLEX Connect 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.