BrokersFinancial
WEALTH MANAGEMENT

# Retirement Ally
## STRATEGIC PLUS MODELS

The Retirement Ally Strategic Plus Models employ an active 'risk-first' approach which combines the benefits of strategic and tactical strategies into a single solution. The models utilize a diversified core allocation built upon the global insight and expertise of Blackrock, who is trusted to managed more money than any other investment manager in the world*. Adaptive management and a risk overlay allow the models to respond to ever-changing market conditions. **Source: Blackrock as of June 30, 2018*

**INVESTMENT MINIMUMS**

Strategic Plus Models

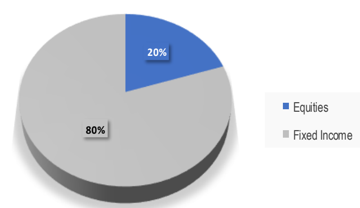
Minimum Account Size $25,000

- Risk-managed exposure to U.S. and global markets
- Low-cost, index-tracking exchange-traded funds (ETFs)
- Actively-managed, outcome-oriented mutual funds with a time-tested, proven process
- Model allocation adapted to market insights and outlook
- Core allocation is supplemented with actively-managed fixed income, total return, and risk-managed equity funds.
- Risk overlay can allocate up to 50% to cash to mitigate large drawdowns when market conditions warrant defensive positioning
- Seek to provide excess value-added returns with less volatility over a full market cycle

### *STRATEGIC PLUS CONSERVATIVE*

The Strategic Plus Conservative model is for the investor who is seeking modest growth while attempting to minimize volatility.

The model core is comprised of fixed income investments with limited exposure to equities.

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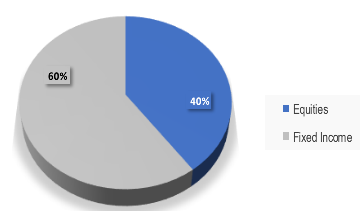
### *STRATEGIC PLUS INCOME*

The Strategic Plus Income model is for the investor who is seeking current income and/or modest growth with limited volatility.

The model core is comprised of fixed income investments with moderate exposure to dividend-paying equities.

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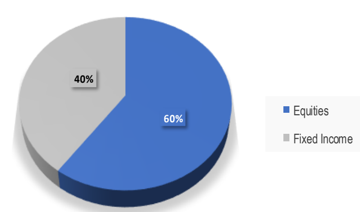
### *STRATEGIC PLUS MODERATE*

The Strategic Plus Moderate model is for the investor who is seeking growth and willing to accept some volatility.

The model core is comprised of equities with moderate exposure to fixed income investments.

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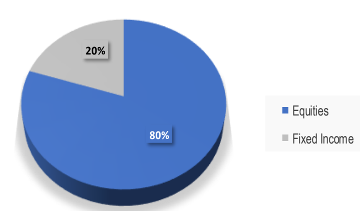
### *STRATEGIC PLUS GROWTH*

The Strategic Plus Growth model is for the investor who is seeking long-term growth and willing to accept higher volatility.

The model core is comprised of equities with limited exposure to fixed income investments.




See reverse side for important disclosure information

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## STRATEGIC PLUS MODELS

Retirement Ally Strategic Plus Disclosures:

The pie charts utilized reflect how a portfolio is generally allocated in broad categories and does not represent any specific allocation.

Investing involves risk. Investments will fluctuate and when redeemed may be worth more or less than when originally invested.

This material is not intended to be relied upon as investment advice and is not a recommendation, offer, or solicitation to buy or sell any securities or to adopt any investment strategy.

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The Retirement Ally Strategic Plus models consist of ETFs (Exchange Traded Funds) that track broad capital market indices and mutual funds.

Mutual funds and ETFs are sold by prospectus. Please consider the investment objectives, risks, charges, and expenses carefully before investing. The prospectus, which contains this and other information about the investment company, can be obtained from the Fund Company Fund Company or your financial professional. Be sure to read the prospectus carefully before deciding whether to invest.

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