BrokersFinancial
WEALTH MANAGEMENT

Retirement Ally
CORE SERIES MODELS

The Retirement Ally Core Series Models are designed to provide a globally-diversified core portfolio allocation. The Core Series models are customized allocations and are available exclusively to Brokers Financial Advisors. The models are built upon the scale, technology, global insight and expertise of Blackrock, the world's largest money manager*. **Source: Blackrock as of June 30, 2018*

INVESTMENT MINIMUMS

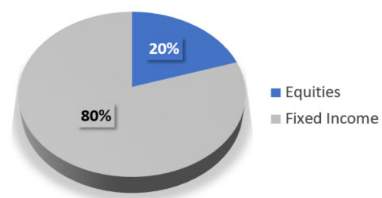
Core Series Models
Minimum Account Size $25,000
Core Series Lite Models
Minimum Account Size $5,000

- Globally-diversified, all-in-one core
- Cost-effective allocation utilizes exchange-traded funds (ETFs) and actively-managed mutual funds
- Strategic asset allocation with active insight
- Disciplined approach to risk management aligns risk profile with model objectives
- Blackrock's proprietary risk and portfolio analytics platform Aladdin® provides real-time risk analysis to better understand and control risk exposures

CORE SERIES CONSERVATIVE

The Conservative model is for the investor who is seeking modest growth with minimal volatility. The model is comprised primarily of fixed income ETFs with limited equity exposure.

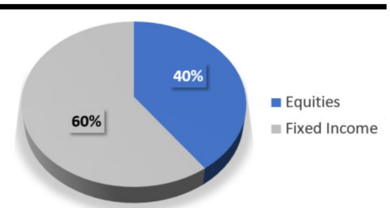
The Core Series lite model is tailored to accommodate smaller account sizes while providing similar asset exposures as the Core Series Conservative model.



CORE SERIES MODERATELY CONSERVATIVE

The Moderately Conservative model is for the investor who is seeking modest growth with limited volatility. The model is comprised primarily of fixed income and equity ETFs.

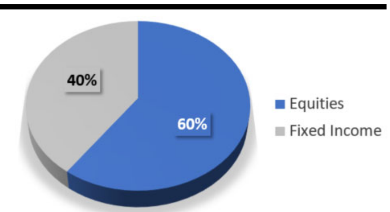
The Core Series lite model is tailored to accommodate smaller account sizes while providing similar asset exposures as the Core Series Moderately Conservative model.



CORE SERIES MODERATE

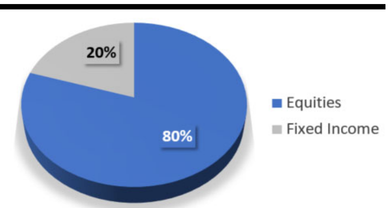
The Moderate model is for the investor who is seeking growth and willing to accept some volatility. The model is comprised primarily of equity and fixed income ETFs.

The Core Series lite model is tailored to accommodate smaller account sizes while providing similar asset exposures as the Core Series Moderate model.



CORE SERIES MODERATELY AGGRESSIVE

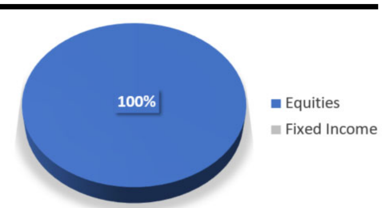
The Moderately Aggressive model is for the investor who is seeking higher growth and willing to accept higher volatility. The model is comprised primarily of equity ETFs with limited fixed income exposure. The Core Series lite model is tailored to accommodate smaller account sizes while providing similar asset exposures as the Core Series Moderately Aggressive model.



CORE SERIES AGGRESSIVE

The Aggressive model is for the investor who is seeking to maximize long-term growth and willing to accept high volatility. The model is comprised primarily of equity ETFs.

The Core Series lite model is tailored to accommodate smaller account sizes while providing similar asset exposures as the Core Series Aggressive model.



See reverse side for important disclosure information

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Retirement Ally Core Series 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.

Before making any investment decision based on this material you should consult with your financial, tax, legal, accounting, or other professional advisor about the information contained in this material and assess whether the information is appropriate regarding your objectives, financial situation, and needs.

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The Retirement Ally Core Series and Core Series Lite models consist of ETFs (Exchange Traded Funds) that track broad capital market indices and/or 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.

Securities and investment advisory services offered through Brokers International Financial Services, LLC. Member SIPC. The Retirement Ally Core Series Models can be obtained through representatives of Brokers International Financial Services, LLC.