Organization name has been redacted for competitive and compliance purposes

Presenting the full capabilities of Name Investment Management with

Making the Transition from Managing Assets to Managing Wealth

Why the Campaign?

Promote the Full Capabilities of Managed Portfolios

Present the Problem

To be competitive and increase client satisfaction, advisors need to transition from managing assets to managing wealth.

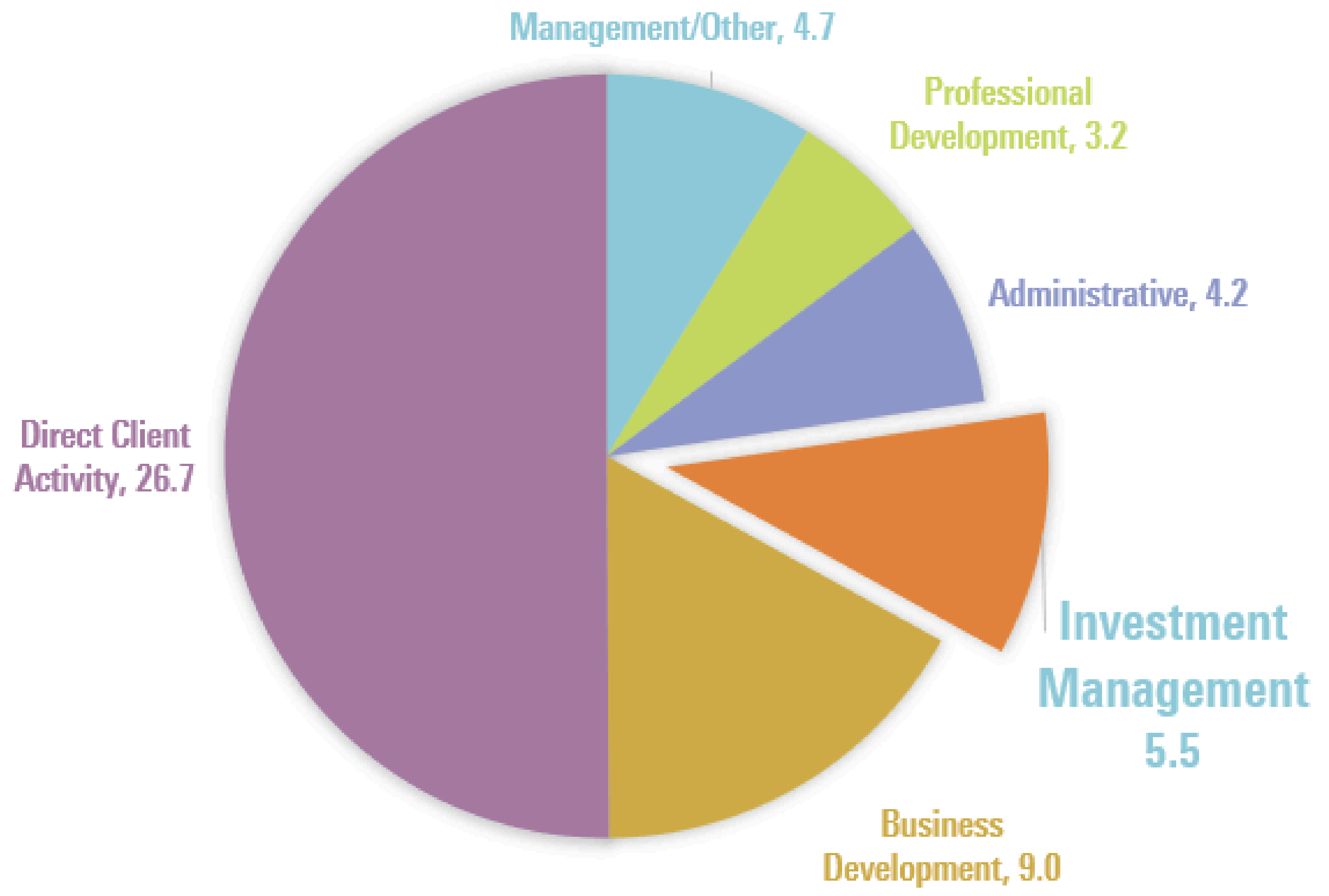
Tell a Story

The benefits of realigning a practice by outsourcing investment management.

Present Managed Portfolios as the Holistic Solution

We offer more than industry-recognized model portfolios; we offer a platform that can power an advisor's practice.

On average, advisors only spend 5.5 hours weekly or about 10% of their time on investment management



Source: How Financial Planners Actually Do Financial Planning, Michael Kitces, 2018, www.kitces.com.

Primary Positioning

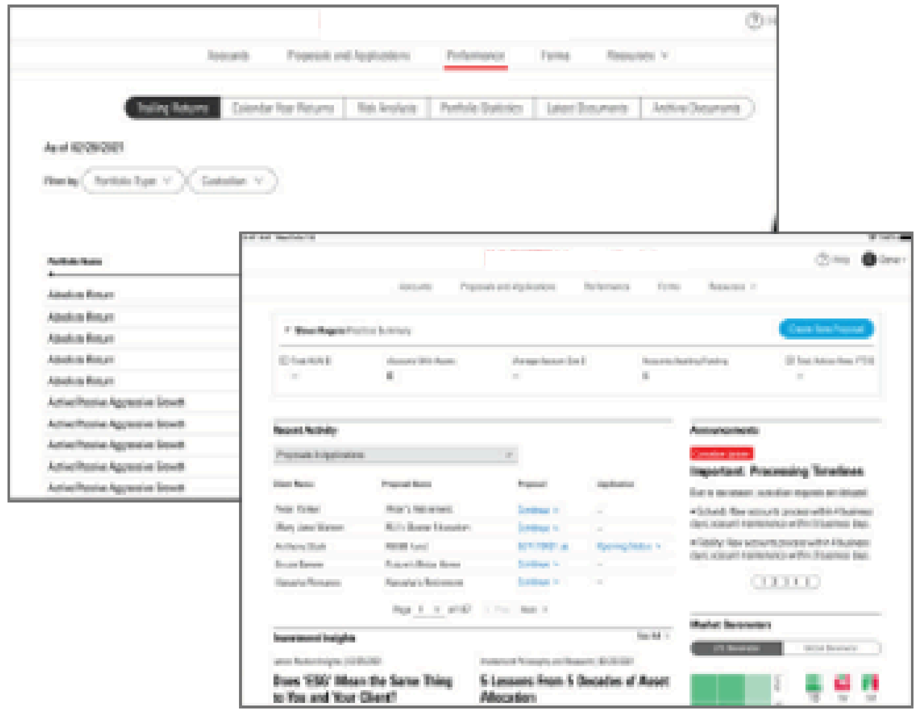
Positioning to Outsource Leveraging our Platform

Transition from Managing Assets to Managing Wealth

- Shift the Focus of Your Practice
- Rethink Your Approach to Investment Management
- Build an Integrated Advisory Business with Managed Portfolios
- Enabling Wealth Management
- Streamline and Share Fiduciary Responsibility
- Give 100% to Clients and Their Portfolios

Investment Management

Positioning to Outsource Leveraging our Platform



Portfolios and Strategies

Advisor Tools

Client Portals

Digital Proposal Generation

Dedicated Homepage

Back-end Office Support

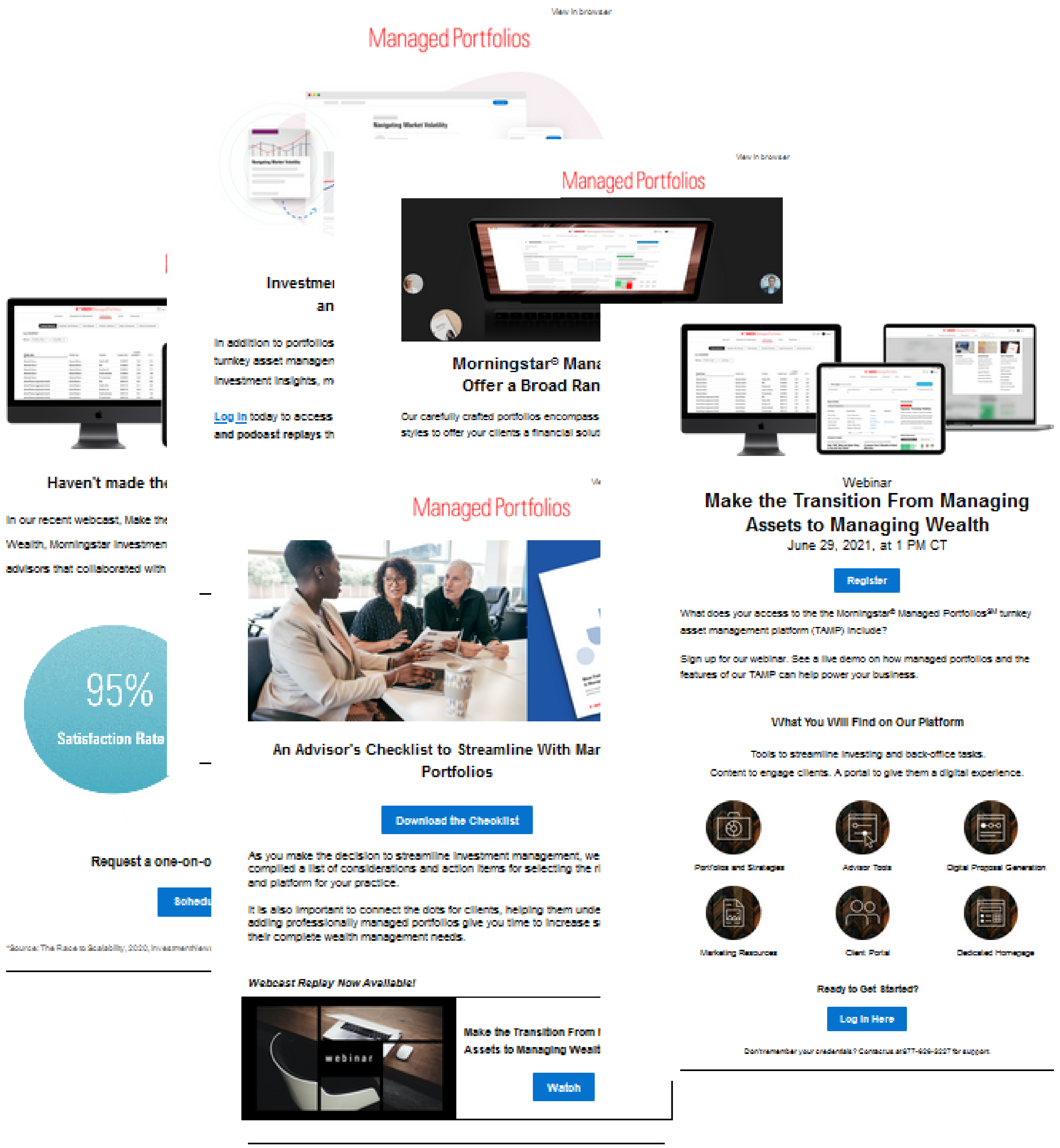
Marketing Resources

An Immersive Turnkey Asset Management Platform to Power Your Practice

- Features to Empower
- Personalized Support
- Designed to Help Advisors Focus on What's Most Important, Their Clients
- 2021 America's Best TAMPs Recognized

What’s Been Done?

Email Journeys



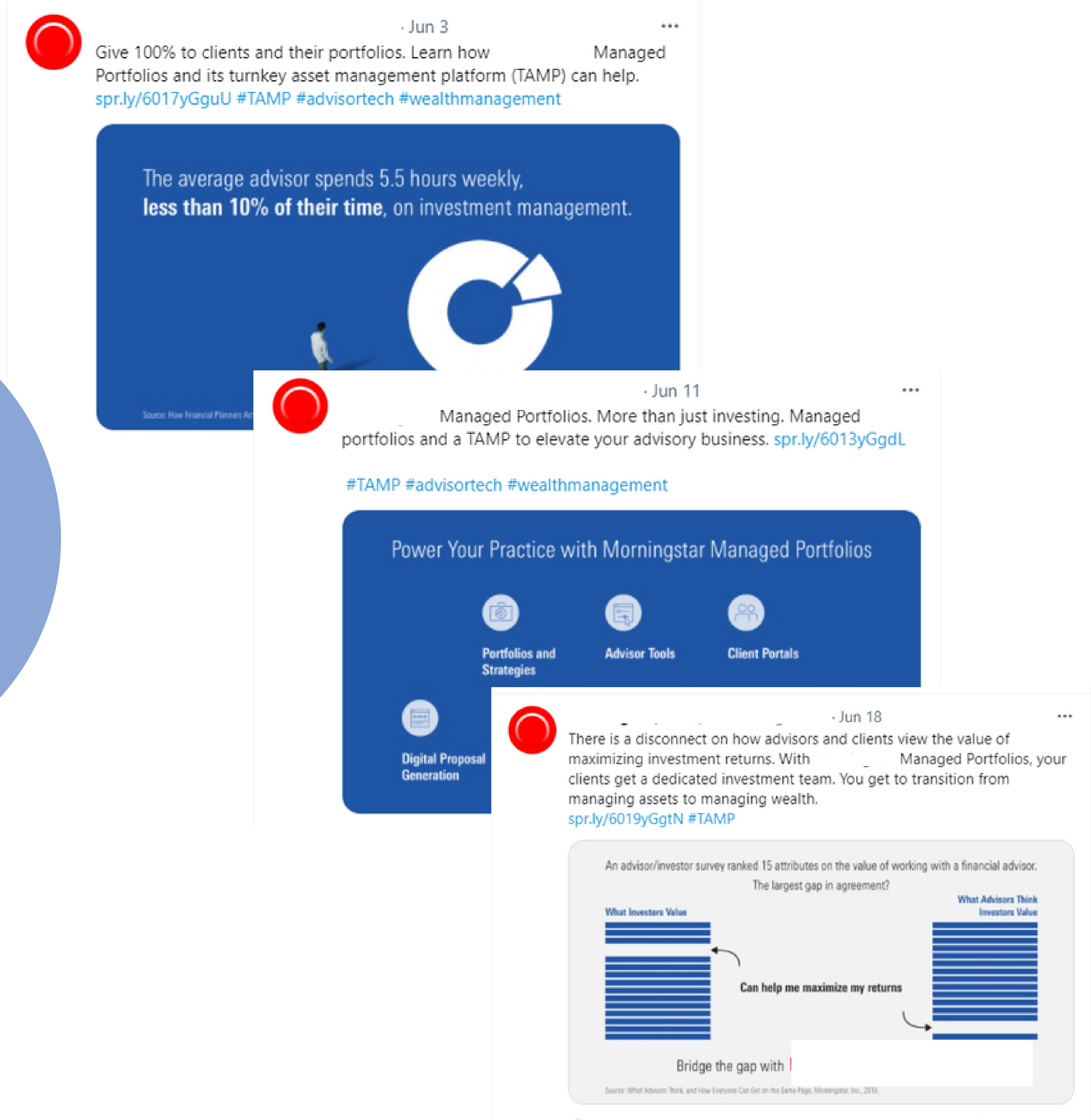
April

- Introduced *Managing Wealth*
- Incorporated the TAMP as part of Managed Portfolios
- Generated engagement with new brochure, checklist, webpage and demo/login requests

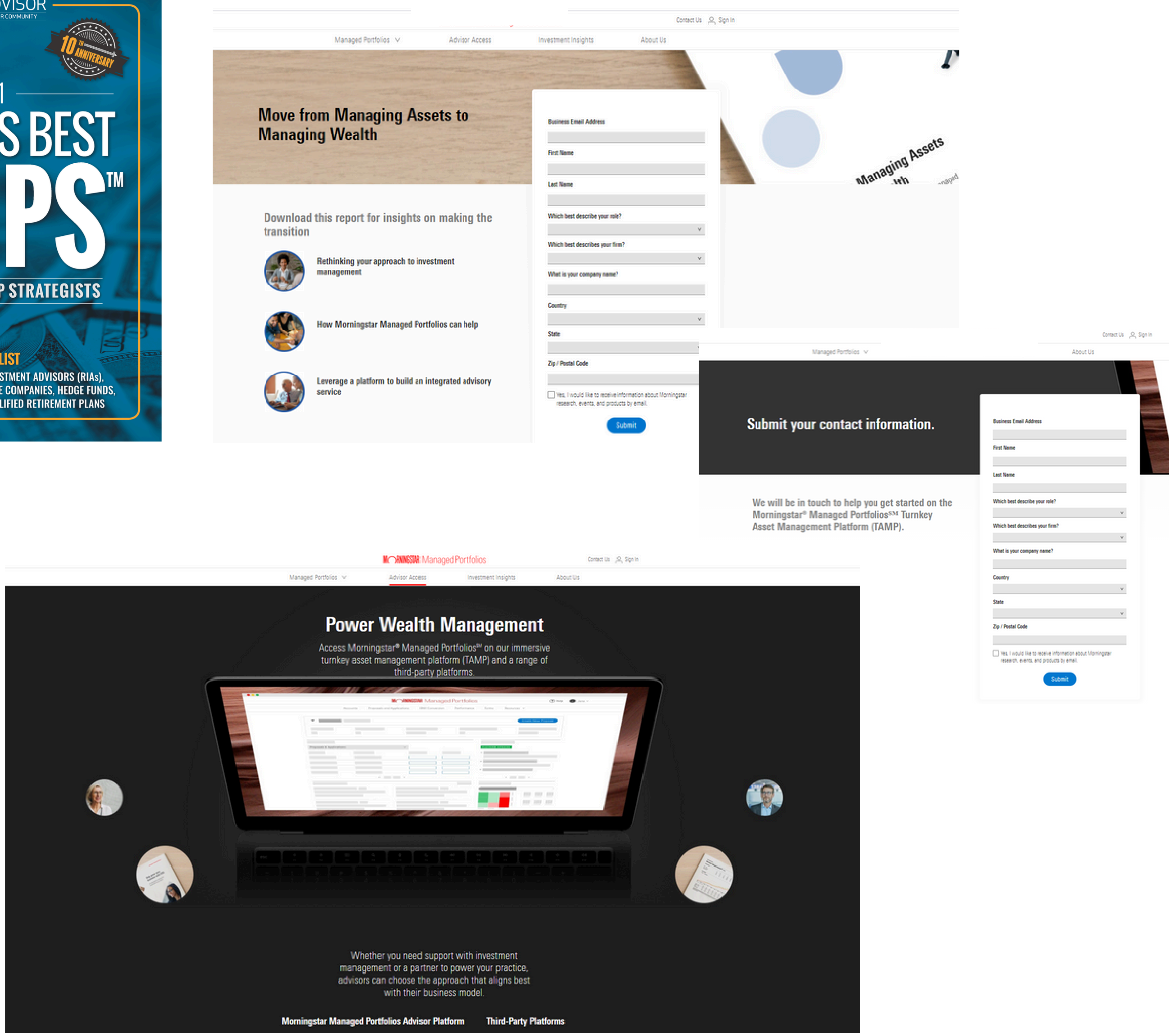
June

- Two journeys with specific messaging for Advisors with and without logins
- Promoted the Managing Wealth webcast lead by Sales
- Continued to promote platform benefits and reasons to manage wealth over assets

Paid/Organic Social and Google Display



Supporting Assets

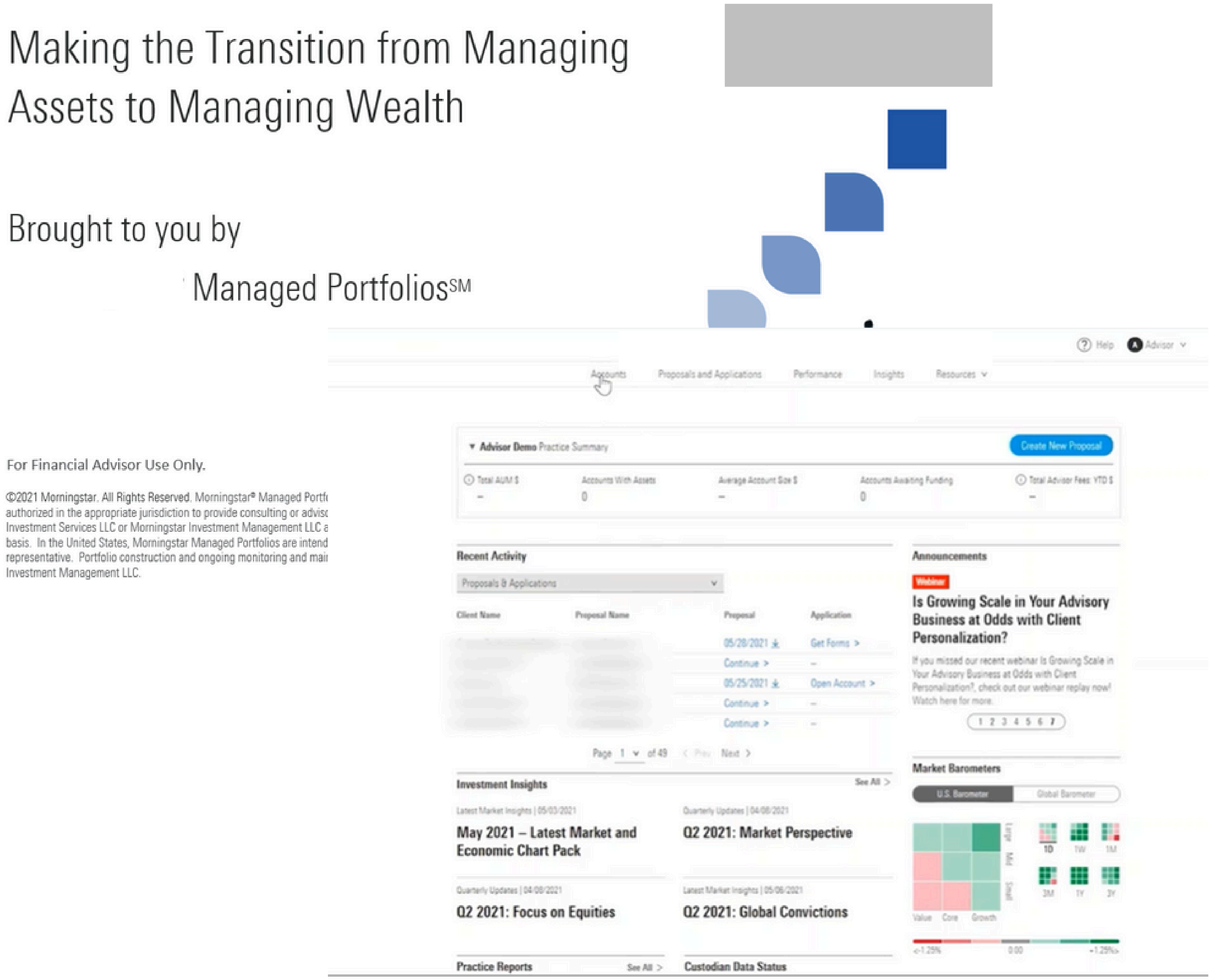


2021 America's Best TAMPs Recognized

Recognized as the 3rd leading U.S. TAMP for 2020. Ranking of the Morningstar® Managed Portfolios℠ turnkey asset management platform (TAMP) is based on a December 2020 Wealth Advisor subscriber survey of 31 TAMPs/strategists for service and performance. As a paid sponsor, Morningstar Investment Management is featured in the publication, but the sponsorship is not associated with the 3rd place ranking.

Quarterly Engagement

Sales lead webcast and demo with live Q&A



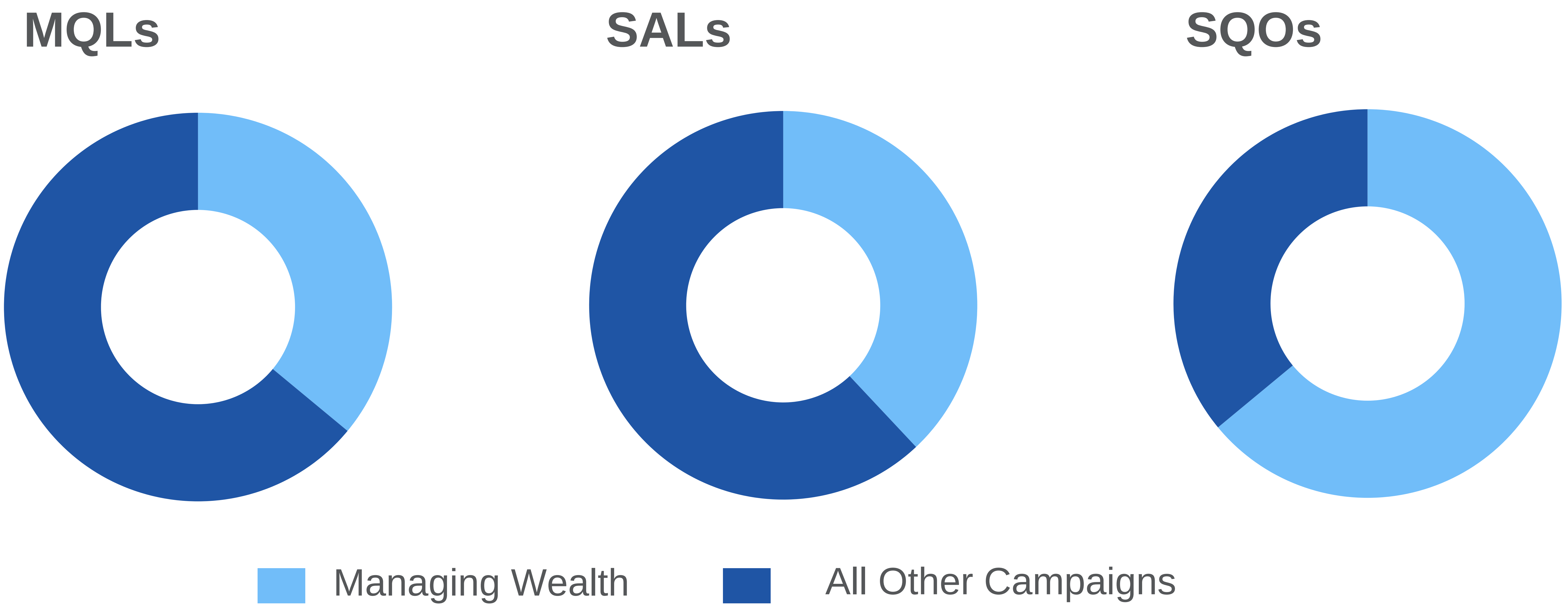
Save the Date

Next webcast: September 14th

Campaign Insights

Gaining Traction But Resonating

Accounting for about 1/3 of MQLs and SALs for the time period, represents 64% of SQOs. The message is resonating with advisors.



What’s Next?

Value Add Program: Manage Wealth to Grow Your Business

Making the Transition from Managing Assets to Managing Wealth

You are Your Brand; Leveraging Your Personal Brand to Enhance Your Productivity

Face To Face: Building Life-Long Multi-Generational Clients™

The $14 Trillion Opportunity™ Your Essential Guide to Engaging the Female Client

Brought to you by:

Industry Consultants

Focus Partners

Questions?