

Destination Portfolio Program:



ASSET ALLOCATION	PORTFOLIO MODEL	INVESTMENT GOAL
Income 20/80 (Equity/Fixed Income)		Seeks to achieve a high level of income with an opportunity for some capital appreciation
Moderate Income 40/60 (Equity/Fixed Income)		Seeks to provide current income with the opportunity for capital appreciation
Balanced Growth and Income 50/50 (Equity/Fixed Income)		Seeks to provide a balance between long-term growth of capital and current income
Moderate Growth 60/40 (Equity/Fixed Income)		Seeks to provide long-term growth of capital with a moderate level of current income
Growth 80/20 (Equity/Fixed Income)		Seeks to provide long-term capital appreciation with a small level of current income

Equity
Fixed Income

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To help decide which portfolio objective works best for you, we will discuss your financial goals and risk tolerance. This combined with your life stage will help determine a suitable investment approach and program to meet your needs. A solution that represents a comprehensive approach to managing your investments by offering five portfolio models. Most investors prefer this fully managed approach for their investment dollars to help simplify their investment decisions.