

**Strategy:** Focused Asset Allocation  
**Investment Vehicle:** ETF's, Stocks  
**Models:** Pure US Equity

### Philosophy & Strategy

This strategy seeks long-term capital appreciation by investing in companies within an emerging or evolving growth industry that are consistently growing their Earnings per Share (EPS) over time. The strategy seeks to limit the portfolio to approximately 12 individual names with no inherent sector bias representing approximately 50% of the total assets under management with the balance of the portfolio's assets held in the S&P 500 Index via the SPY Exchange Traded Fund (ETF). Individual, large cap stocks are chosen from the S&P 500 with a growth-oriented bias, using "GARP" (growth at a reasonable price) as a discretionary guideline.

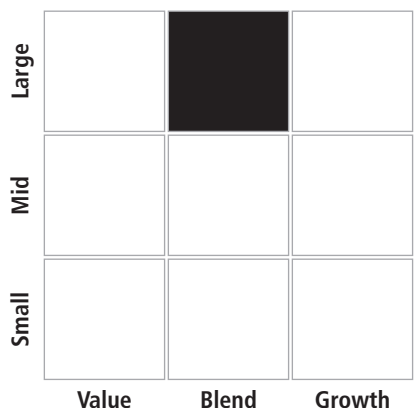
### About Portfolio Design Advisors

Established in 2006, and re-invented under new ownership in 2009, Portfolio Design Advisors provides a broad range of investment advisory services, including portfolio management, consulting, and financial planning. It specializes in intelligent portfolio construction and design by creating sophisticated, customized investment strategies. The firm's CFA® charterholders have access to numerous world-class, institutional-quality investments.

Models are designed to be straightforward, common sense approaches that address the specific financial situation and achieve the needs of the individual investor, while also providing protection in extremely volatile markets. The firm believes in long-term management strategies that create Alpha over time. Asset allocation decisions are based on market fundamentals and employ ongoing oversight and active management to achieve desired strategic asset allocation targets.

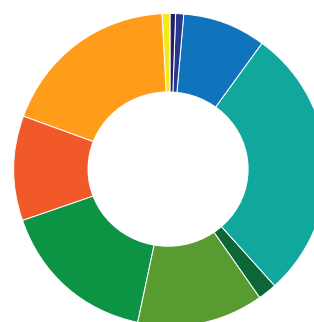
### Models

#### Morningstar Style Box™



Market Cap Giant	44.4%
Market Cap Large	42.0%
Market Cap Mid	13.5%
Market Cap Small	0.1%
Market Cap Micro	0.0%

#### Equity Regional Exposure



Energy	0.7%
Materials	0.7%
Industrials	8.8%
Consumer Discretionary	28.0%
Consumer Staples	2.0%
Healthcare	12.9%
Financials	16.3%
Information Technology	10.8%
Communication Services	18.3%
Utilities	0.8%

Disclosures on the back of this Strategist Review

This information is provided for general purposes and is subject to change without notice. The information does not represent, ensure or imply that services, strategies or methods of analysis offered can or will predict future results, identify market tops or bottoms or insulate investors from losses. The information has been obtained from sources considered to be reliable, but it is not guaranteed. Past performance is not a guarantee of future results. Investors should always seek individual financial advice based on their own personal circumstances before acting.

All types of investing involve risks and is subject to market fluctuations. It is possible to lose money by investing in securities, fixed income and alternative investments.

Specific types of asset classes and sectors have different and specific risks. Examples include:

Foreign investments and emerging markets may be more volatile and involve additional expenses and special risks, including currency exchanges and political and economic uncertainties. Small-company stocks as compared to large-company stocks entail additional risks, and they can have greater price fluctuations. Bonds are exposed to credit and interest rate risk (when rates rise, bond fund prices generally fall). Lower-rated bonds are subject to greater fluctuations in value and are more at risk of default of income and principal. REITs, specialty & sector funds may invest in a limited number of issues or sectors, which can increase volatility and exposure affecting that sector.

Alternative investments, also known as Non-Market Correlated investments, may involve specific risks that are greater than those associated with traditional investments. These risks include: illiquidity, tax considerations, increased expenses, potentially speculative strategies, global economic uncertainties.

Asset allocation and diversification do not ensure a profit or protect against loss in a declining market.

**An investment in a money market fund is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Although the Fund seeks to preserve the value of the investment at \$1.00 per share, it is possible to lose money by investing in the Fund.**

**Investors should carefully consider the investment objectives, risks, charges and expenses of the mutual funds or ETFs in the referenced strategy. This and other important information is contained in the prospectus, which can be obtained from your Financial Advisor and should be read carefully before investing.**