

INVESTMENT PLATFORM



Integrated's investment platform offers choice

Integrated's menu of investment solutions offers advisors a breadth of choice across numerous dimensions. Eleven highly differentiated series provide access to 61 well-diversified portfolios. The Custom series offers additional choice through its unique ability to custom-tailor institutional quality portfolios for your largest client relationships.

Series	Number of tax sensitive portfolios	Number of portfolios that ignore taxes	Investment manager	Types of securities used	Account minimum (\$1,000)	Integrated's fee (bps)	Notes
Alternatives		2	Integrated	BTF, REIT	10	29	Specialized asset categories
Classic	3	4	BNY Mellon	AMF, ETF	50	29	Multi-manager
Concentrated		4	Integrated <i>or</i> Julex Capital	IS, ETF, PMF	10 or 50	29 or 39	Narrowly focused, some with active risk management
Custom	<i>infinite</i>	<i>infinite</i>	Integrated	<i>anything</i>	300 to 10,000	<i>varies</i>	Institutional quality alternatives, custom built one client at a time, bespoke
Dynamic		4	Julex Capital	ETF	75	29	Tactical asset allocation
Enhanced	3	4	JP Morgan	AMF, ETF	50	29	Active management by JP Morgan
Factor	3	4	BlackRock <i>and</i> Integrated jointly	AMF, ETF	50	29	Active equity factor tilts by BlackRock and tactical bond management by Integrated
Focused	6		Integrated	IS, ETF	175	29	Ultra tax efficient individual stocks
Fundamental		5	BNY Mellon	ETF	10	29	Low account minimum
Opportunistic <i>(bond)</i>	1	5	Julex Capital <i>or</i> Integrated	BTF, ETF, CEF	10	29	Bond solutions for needs arriving during years 0-5
Opportunistic <i>(sector rotation)</i>		6	Integrated	ETF	50	29	Tactical asset allocation
Passive	3	4	Dimensional	ETF	50	29	Passive management with significant factor tilts

BTF = Bond Term Fund, REIT = Real Estate Investment Trust, AMF = Active Mutual Fund, ETF = Exchange Traded Fund, IS = Individual Stock, CEF = Closed End Fund, PMF = Passive Mutual Fund

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