

Enjoy the flexibility and potential benefits of outsourced services – at zero platform fees when using select managed models

Invesco managed models provide a range of tailored investment solutions to help meet clients' needs:

Broad use	Model Series	Overview	Tax-aware	Description / rationale for use
Target risk "Complete/core" portfolio options Broadly diversified portfolios with a range of risk levels	Cornerstone Total Beta	Diversified small account solution	Yes	ETF portfolios designed for a complete small account solution
	Pinnacle Total Beta	Core & Smart Beta ETF portfolios	Yes	Portfolios that combine both core and factor-based ETF portfolios
	Pinnacle Smart Beta	Smart Beta ETF portfolios	–	Smart beta focused ETF portfolios combining a range of investment factors
	Pinnacle Hybrid Plus Multi-Manager	Hybrid ETF and MF portfolios	–	Combining the "best of both" active and passively managed holdings with alternative exposure
	Pinnacle Mutual Fund Plus	Active MF portfolios	–	Actively managed Mutual Fund only portfolios targeting outperformance
Sleeves/completion Portfolio options Solutions providing targeted portfolio exposure	Smart Beta (Primerica Lifetime Investment Platform)	Focused on international Equity	–	Provide broad international exposure across market capitalizations and styles, both in developed and emerging markets
	International Diversification	Target international exposure	–	Provides exposure to a blend of equity and fixed income that seeks to provide a counter to "home-country bias" often present in portfolios
	U.S. Factor Rotation Portfolio	Target US Equity Factor Rotation	–	Dynamic US equity solution, invests in five factor ETFs
	BulletShares Municipal Series	Target Muni Bond Ladder	Yes	Convenient approach to portfolio laddering across four maturity bands: 0-3, 0-5, 0-7 and 0-10 years. A potential solution for decumulation strategies by allowing customized bond portfolios tailored to specific maturity profiles, risk preferences and investment goals
	BulletShares Corporate Series	Target Corp Bond Ladder	–	

Provide better client service at a lower cost while unlocking the potential benefits of models and outsourced services.
To schedule a demo and learn more, please contact us at sales@intelliflo.com or 1-800-970-9080.

Managed models are offered through Invesco Advisers, Inc. 

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