

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

managed models* provide a range of tailored investment solutions to meet clients' needs

Broad use	Name	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	Low-cost 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 – value, growth, low vol, momentum etc.
	Pinnacle Hybrid Plus	Hybrid ETF and MF portfolios	–	Combining the "best of both" active and passively managed holdings with Alternative exposure
	Pinnacle Active Plus	Active MF portfolios	–	Actively managed Mutual Fund only portfolios targeting outperformance
Sleeves/Completion Portfolio Options Solutions providing targeted portfolio exposure	International Equity	Focused on international Equity	–	Provide broad international exposure across market capitalizations and styles, both in developed and emerging markets
	International Blend	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
	US Factor Rotation	Target US Equity Factor Rotation	–	Cost-effective, dynamic US equity solution, invests in five factor ETFs that target the following factors: Value, Low Volatility, Momentum, Quality, and Size
	Bulletshares Municipal	Target Muni Bond Ladder	Yes	Offering a cost-effective, and convenient approach to portfolio laddering across four maturity bands: 0-3, 0-5, 0-7 and 0-10 years. Valuable solution for decumulation strategies by allowing customized bond portfolios tailored to specific maturity profiles, risk preferences and investment goals
	Bulletshares Corporate	Target Corp Bond Ladder	–	

Provide better client service at a lower cost while unlocking the benefits of models and outsourced services. To schedule a demo and learn more, please contact us at sales@intellifloadvisers.com or 1-800-607-3340

*managed models in partnership with  Invesco