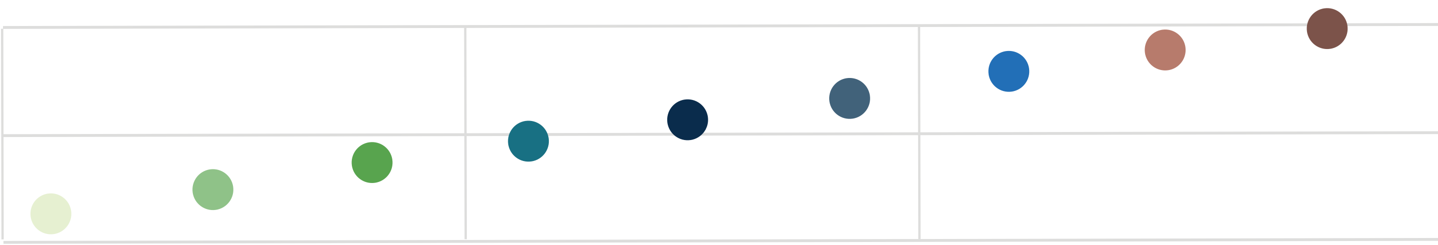
Your Investment Process, SIMPLIFIED



We are **NOT** a third party asset manager.

FORGET what you know about investment managers.

We offer something **COMPLETELY DIFFERENT**.

Built by advisors for advisors, FocusPoint's white label portfolio management process was designed – and continues to evolve – around what you really need.

1 CONTROL

YOU keep discretion and remain in control of your client investment experience.

We offer you a unique investment management experience. It's a solution that makes sense, allowing your FocusPoint team to manage and trade white label portfolios for you, while you maintain discretion.

It's an investment process that fits your lifestyle and your business.

2 FLEXIBILITY

The solution is designed to address your clients' unique needs.

Most advisors need to build around existing assets and accommodate various account types and sizes.

That's why our white label portfolios are FLEXIBLE – they can be customized to accommodate your specific needs and clients. We'll help you get all of your existing assets and accounts organized – quickly and based on what's best for your clients. Unlike a typical investment manager, we do not force everything into cash – we work together with you to do what you feel is best for your clients.

3 COMMUNICATION

You have direct access to—and regular communication from—your investment management team.

In a perfect world, you probably wouldn't be spending lots of time on investment research. You'd be doing what you enjoy most and do best: meeting with clients and/or gathering assets. Advisors who work with us are freed up to do just that.

Your investment team is a CFA-led Investment Policy Committee, who constantly reviews the investments within each portfolio and communicates insight on a daily, weekly, and monthly basis to all advisors. ***This steady communication allows you to make informed decisions – yet spend only a handful of hours each month on portfolio management.***

4 TRANSPARENCY

Our solution is transparent to your clients.

Fiercely independent advisors enjoy our true white label solution. FocusPoint seeks to remain completely invisible to your clients. Your clients are not required to sign an agreement with us; we support you, the advisor.

We don't dictate how you manage your practice; we simply provide you with tools, leverage, and a highly scalable business model. And, our integrated suite of technology is non-proprietary; we designed them to be compatible with any planning process or software you might use.

You can customize your white label client reports and presentations, Plus, you're welcome to use anything we have already created, or edit whatever you like to suit your unique needs—all displaying your own unique logo, color scheme, and brand.

5 A CLEAR AND SIMPLE CLIENT EXPERIENCE

We can help you design and execute your Investment Philosophy.

Our team can help you design/update your clear, effective and customized investment process.

We can also help you create and incorporate your Investment Philosophy. All of this can help to streamline and enhance your client experience.

6 DOCUMENTATION

We provide you with documented rationale for each and every investment recommendation.

Each time a portfolio trade, change, or rebalance is recommended, your investment management team provides you with documented justification for the recommendation.

Not only does this unique system give you the ability to speak knowledgeably to your clients about any changes withing their portfolios, it can be greatly beneficial to you from a compliance and records standpoint.

In summary, you're using your own customized Investment Philosophy to design model portfolios to accommodate all of your clients' needs. Concurrently, you are utilizing the expertise of a trusted portfolio management team who makes ongoing recommendations, keeping you apprised of what you need to know in order to make—and document—solid, informed decisions for your clients.

You'll be speaking knowledgeably to your clients about their portfolios, yet you'll be spending a limited amount of your valuable time on the investments themselves...it's a simple, unique solution that just makes sense.

Advisors who work with us have been amazed at the simplicity of our systems and the strategies our team can provide. They find they are able to consolidate most assets into a streamlined, manageable, controlled fee environment, while increasing revenue and the intrinsic value of their business.

Contact us to start simplifying YOUR investment process today.
Phone: 866.201.3034 | **Web:** www.focuspointsolutions.com