



## IAMS Wealth Management Core Platform

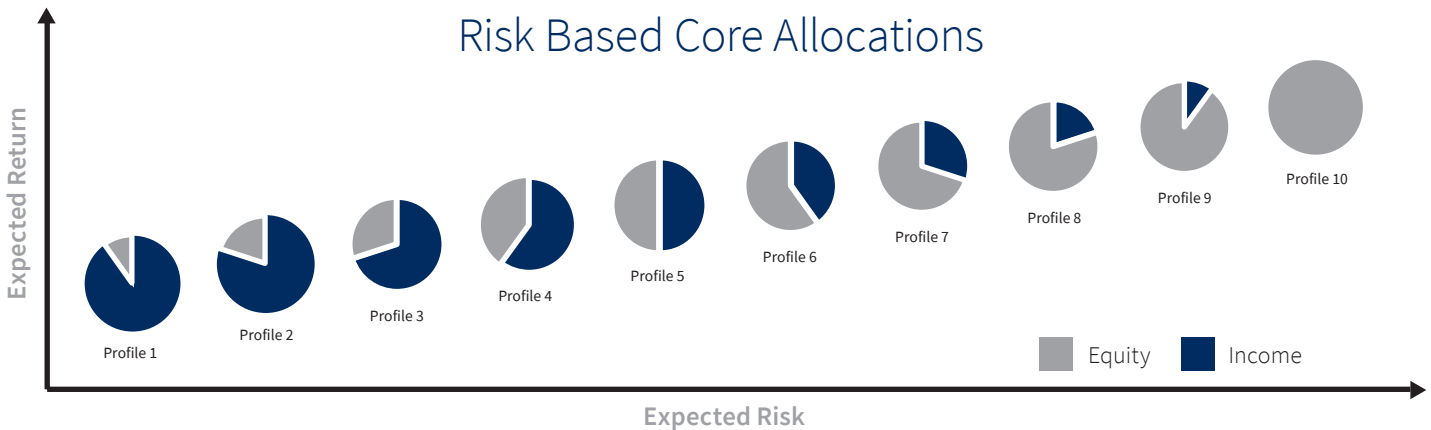
When investing, it's beneficial to have a consistent plan to deliver over full market cycles. Our core platform is designed to align with a client's risk tolerance and rebalance accordingly to stick with that tolerance for the lifetime of the portfolio. If the client's needs or goals ever change, so can the portfolio.

These 10 profiles, consisting of a blend of equity and income strategies, systematically rebalance using various rules and thresholds depending on what fund manager is used. The ultimate goal is to capture market upside in times of growth and limit downside risk during market declines.

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	Profile 1	Profile 2	Profile 3	Profile 4	Profile 5	Profile 6	Profile 7	Profile 8	Profile 9	Profile 10
Equity	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Income	90%	80%	70%	60%	50%	40%	30%	20%	10%	0%
<b>Total Allocation %</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### Risk Based Core Allocations



## Profile Strategies

### Stability — Preserving Your Wealth

Profiles 1-5 span the Stability segment of the risk/return spectrum and these investors generally have a shorter time horizon and can't afford heavy losses. These strategies are designed to meet the needs of investors who want to minimize downside risk and we aim to accomplish this goal using systematic rebalancing that can help stabilize the portfolios and lower the overall volatility.

### Growth — Building Your Wealth

Profiles 6-10 span the Growth segment of the risk/return spectrum and these investors generally have a longer time horizon and are looking to accumulate wealth. These strategies are designed to meet the need of investors who can afford to recover from short-term losses in periods of high market volatility because goal fulfillment is many years or even decades down the road.

## Income Strategy Options

Manager Name	Strategy Name	Investment Objective
Calton & Associates, Inc.	Premier MAP Sector Rotation Fixed Income	Conservative
First Trust Portfolios	Core Plus Fixed Income	Conservative
First Trust Portfolios	Diversified Low Duration Fixed Income	Conservative
First Trust Portfolios	Diversified Low Duration Fixed Income - Tax Sensitive	Conservative
First Trust Portfolios	High Income	Conservative Moderate
First Trust Portfolios	High Income – Tax Sensitive	Conservative
Fusion Capital Management	RS Unconstrained Fixed Income	Conservative Moderate
Optimus Advisory Group	Optimus Tactical Bond	Moderate

## Equity Strategy Options

Manager Name	Strategy Name	Investment Objective
Alpha DNA Investment Management	IAS Best Equity	Growth
Alpha DNA Investment Management	IAS Equity Long/Short	Moderate Growth
Brookmont Capital	Dividend Equity	Moderate Growth
Calton & Associates, Inc.	Premier MAP Sector Rotation Equities	Moderate Growth
First Trust Portfolios	All Equity	Growth
First Trust Portfolios	Equity Income	Moderate Growth
First Trust Portfolios	International Equity	Moderate Growth
Fusion Capital Management	RS Domestic Equity (Cap Weighted)	Moderate Growth
Fusion Capital Management	RS Domestic Equity (Sector Rotation)	Growth
Fusion Capital Management	RS Global Equity	Moderate Growth
Lear Investment Management	Global Vigilance	Moderate Growth
Optimus Advisory Group	Optimus Dynamic Equity	Moderate Growth

## Alternative Strategy Options

Manager Name	Strategy Name	Investment Objective
Black Creek Capital Markets, LLC	PREDEX	Conservative
Calton & Associates, Inc.	Premier MAP Sector Rotation Low Correlation	Conservative Moderate
First Trust Portfolio	Alternatives	Conservative Moderate

## Objective-Specific Blended Options

Manager Name	Strategy Name	Investment Objective
First Trust Portfolios	Aggressive Growth	Growth
First Trust Portfolios	Moderate Growth	Moderate Growth
First Trust Portfolios	Balanced	Moderate
First Trust Portfolios	Conservative	Moderate
First Trust Portfolios	Capital Preservation	Conservative Moderate
Taiber Kosmala	Right Trend Aggressive	Moderate Growth
Taiber Kosmala	Right Trend Moderate	Moderate
Taiber Kosmala	Right Trend Conservative	Conservative Moderate



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