

Strategic Portfolios

As financial markets evolve, so do your clients' investment needs. While the expanding universe of choices and innovations presents opportunities, evaluating every possibility can be a challenge. How can you help clients make choices best-suited to their individual financial goals, risk requirements, and tax situation?

Kestra Investment Management (Kestra IM) is here to help. For your clients seeking passive investment strategies and market-like returns, our **Strategic Portfolios** offer an efficient, streamlined solution with lower turnover while maintaining exposure to potential economic growth.

Sophisticated Model Portfolios

A model portfolio is a curated mix of investments, incorporating investing best practices such as a diversified asset allocation that maximizes opportunities within a given risk tolerance. The portfolios are regularly rebalanced to help ensure that the portfolio remains consistent with the model's underlying goals.

With Kestra IM model portfolios, our investment team regularly:



Analyzes the universe of potential investments (ie., ETFs, mutual funds, and more)



Selects the most suitable funds for the model portfolios



Monitors portfolio allocations and fund performance



Rebalances allocation weights within broadly defined asset classes to keep portfolios aligned with their goals

Flexibility to pursue a variety of investing goals

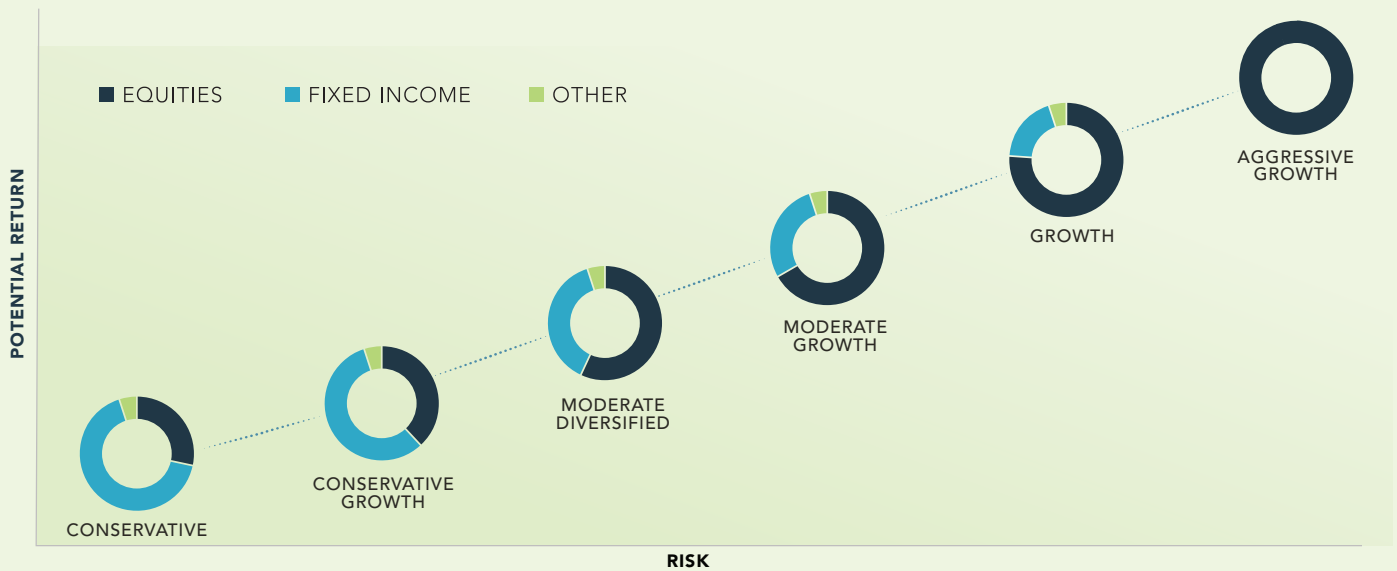
Your clients may have different accounts for different purposes—a rainy day fund, current income generation, savings for a new car or house, a child’s education, retirement, or legacy. Your clients’ needs and goals may be addressed with a single model portfolio or combination, depending on what you recommend for their current situation.

Kestra IM model portfolios help long term investors pursue a variety of goals ranging from capital preservation to income

generation to growth, and various combinations. Our multi-asset class portfolios are designed to provide diversified, core allocation solutions across a spectrum of risk profiles, in a cost efficient way.

- **Strategic portfolios** offer exposure to potential economic growth while keeping turnover low. This strategy is ideal for an investor looking for market-like returns.
- **“Tax-Aware” strategic portfolios** are also available for tax-conscious investors seeking tax-free income or to maximize after tax returns.

Strategic Portfolios to Meet Any Client’s Risk and Return Needs



Hypothetical for illustrative purposes only.

Independent portfolios including multiple fund managers

Kestra IM evaluates a broad universe of funds from a wide array of fund managers using extensive qualitative and quantitative criteria to select the funds. Selected funds represent various asset classes within each model portfolio. The model portfolios include multiple fund managers, and there are no affiliations between the selected funds and Kestra IM.

Total cost efficiency

Minimizing cost is an integral part of portfolio design. Since investment costs impact clients’ returns, Kestra IM works to manage costs at every step of the investing process.

Deepening focus on your clients’ unique financial needs

Partnering with Kestra Investment Management can help free up time to deepen your understanding of each client’s unique financial situation, thus improving your ability to provide ongoing, personalized financial guidance.

KESTRA INVESTMENT MANAGEMENT TEAM

We are a team of dedicated investment professionals with decades of combined experience, having managed multi-asset portfolios for some of the industry’s most respected firms.

For more information, please reach out to Kestra Investment Management at AskIM@kestrafinancial.com