



2677 17<sup>th</sup> St. Suite 100  
Ammon, ID 83406  
(208) 881-5505  
[www.3PeaksFinancial.com](http://www.3PeaksFinancial.com)

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# Custom Asset Allocation Models

*(Minimum \$10,000, Recommended \$25,000 and up)*

## Customized Models

- Each portfolio is customized to client's specific needs (goals, risk tolerance, liquidity needs, etc) and can be fully taxable (suitable for retirement accounts) or tax sensitive (suitable for non-retirement accounts).
- Less expensive than the Premier Investment Plan.
- Suitable for accounts with frequent withdrawals.

## Investment Selection & Management

- Only investments with consistent above average historical performance vs. their peers (as reported by Morningstar) will be included.
- Investments are monitored quarterly to ensure continued above average performance.
- If an investment's relative performance falls below average it will be replaced.

## Rebalancing\*

- Portfolios are rebalanced twice per year and may cause investor to incur transaction costs, however, most investments used in this portfolio have no transaction fees.

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\*No investment strategy, including rebalancing, assures a profit, or protects against loss.

Investing involves risk, including possible loss of principal.

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through 3 Peaks Financial, a Registered Investment Advisor. 3 Peaks Financial is a separate entity from LPL Financial.