



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

---

# Premier Investment Plan

*(Minimum \$100,000)*

## Core Portfolio

A portion of the portfolio (determined by account owner with our recommendation) is invested in a Custom Asset Allocation Model and is considered the *core portfolio*.

## 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.

## Complimentary Portfolio

The remainder of the portfolio is primarily made up of a diversified portfolio of structured products which includes Market Linked CD's and Market Linked Notes. This is considered the *complimentary portfolio*. Structured products are sophisticated investment vehicles that may involve an increased level of risk. Liquidity is not guaranteed prior to maturity.

---

\*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.