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Non-Model Funds

Description

- This account type is used for clients that want to self-manage their portfolio.
- Investment decisions are made by the client.
- No regular review of portfolio or performance is performed by the advisor.

*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 and separate entity from LPL Financial.