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Premier Asset Allocation Models

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

Prebuilt Models

- 20 models (10 taxable and 10 tax sensitive). Each model is managed for total return and the client can choose the model that most closely meets their needs (goal, risk tolerance, etc).
- Least expensive of the 3 Peaks Financial advisory programs.
- Suitable for accounts with infrequent 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.

*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.