



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 to be the *core portfolio*. It is used for liquidity and income when needed.

### 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 transactions costs. However, most investments used in this portfolio have no transaction fees.

## Complimentary Portfolio

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

---

\*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.