

## STRATEGIC ADVISER PORTFOLIOS (\$50,000 MINIMUM INVESTMENT)

Check out the model portfolios' three year track record at [www.streetscape.com](http://www.streetscape.com).

Click on the **MAS** Tab and then on **Performance Update**.

### Managed Account Solutions

Benefit from a complete end-to-end solution, helping you build long-term relationships with clients:

- Easy-to-use, five-step proposal generator
- Objective research and due diligence on asset managers and funds
- Flexible, online reporting on client accounts
- Automation of essential back-office functions
- Client-friendly, private-label proposals and reports

### WHY STRATEGIC ADVISER PORTFOLIOS? TAKE CONTROL OF YOUR FEE BASED BUSINESS.

National Financial's Managed Account Solutions is an innovative way for you to capitalize on the rising demand for investment advisory services and professional money management. Strategic Adviser Portfolios is an all-in-one investment advisory program: designed to help you take control of your fee-based business.

### WHO IS STRATEGIC ADVISERS?

A Fidelity Investments company, Strategic Advisers, Inc. (SAI), is one of the industry's leading providers of managed accounts<sup>1</sup> with over 20 years of experience in discretionary client management. The originator of Fidelity Investments' approach to asset allocation, Strategic Advisers Investment management team includes a U.S. Equity, a Fixed Income, and an International Portfolio Manager, who work together to construct each investment strategy for Strategic Adviser Portfolios.

Each portfolio manager is supported by a team of mutual fund analysts, who are responsible for performing extensive analysis and due diligence of the available investments for the model portfolios.

SAI currently oversees one of the industry's largest mutual fund wrap programs and has over \$52 billion in assets under management (as of 12/31/08). Capitalize on the knowledge and professional money management experience of SAI<sup>2</sup>.

### WHY THIS PROGRAM?

Gain access to the top-level investment experience of Fidelity's Strategic Advisers, Inc. —

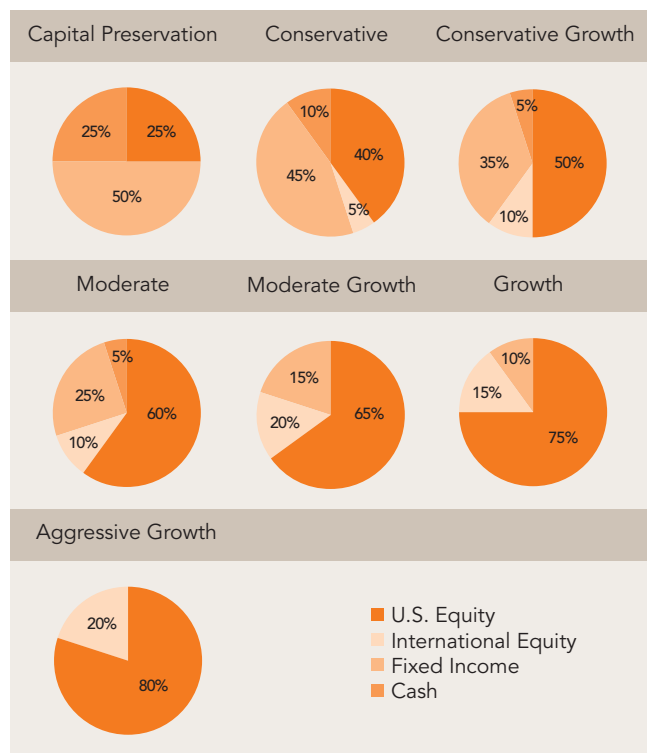
The Power of Strategic Advisers, Inc.

- A proven, disciplined investment approach
- Access to leading money managers
- Institutional methodology and resources
- Risk Management Strategies

**WHAT ARE THE STRATEGIC ADVISER PORTFOLIOS?**

It is a comprehensive program designed to construct and manage appropriately diversified model portfolios. The program offers:

- 13 target model portfolios, including taxable and non-taxable models
- Disciplined asset allocation and broad market diversification<sup>3</sup>
- Proprietary quantitative and qualitative analysis
- Ongoing monitoring and regular rebalancing
- Seven basic target asset mixes:



**HOW DO THEY WORK?**

- Based on the risk/return profile of your client, you will be able to choose a target model portfolio managed by a team of professional money managers.
- The investment team chooses an appropriate mix of mutual funds to populate each model, selecting funds to satisfy each asset class represented in the client’s target asset allocation.
- Based on rigorous performance monitoring and ongoing research, the investment team will adjust the mix of funds in the model portfolios.
- Based on your client’s investment profile, the program provides a clear risk-appropriate investment strategy designed to help pursue each client’s financial goals.

**HERE’S HOW TO GET STARTED.**

It’s easy to get up and running on this innovative offering — visit [www.streetscape.com](http://www.streetscape.com) and click on the Managed Account Solutions section under the Accounts tab.

Contact your Home Office representative for more information on the Strategic Adviser Portfolios or, for sales and product support, call 1.888.612.9300 (9 a.m.–7 p.m., ET) (Envestnet Asset Management, Inc.).



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<sup>1</sup> Cerulli Quantitative Update, Managed Accounts 2008, P. 31, Chapter 1, Exhibit 1.11-Part 1.

<sup>2</sup> Cerulli Quantitative Update, Managed Accounts 2008, P.31, Chapter 1, Exhibit 1.11-Part 1 and Strategic Advisers, Inc.

<sup>3</sup> Diversification does not guarantee a profit or protect against a loss.

Strategic Advisers, Inc., is a registered investment adviser and a Fidelity Investments company.

National Financial’s Managed Account Solutions service is provided by Envestnet Asset Management, Inc., a third-party provider of investment management services. National Financial does not provide investment advisory services in conjunction with the Managed Account Solutions service. Envestnet Asset Management is not a corporate affiliate of National Financial.

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