## ISECTORS
## Vern Sumnicht
## Founder and CEO

We strongly believe that outsourcing is the future of investment management. Outsourcing the portfolio construction role has been proven to create a more efficient advisory foundation, liberating resources to address client concerns and develop new relationships while providing access to the increasingly sophisticated strategies modern investors crave.

Our edge is that unlike firms such as BlackRock and Vanguard that have recently started offering model portfolios, iSectors does not use proprietary ETFs. Instead, we insist on retaining our freedom to select ETFs from best-of-breed managers as we populate our allocation models. We've been doing this since 2008. We know how to live up to the promise of truly open architecture, not tied to internal mandates or sales requirements.

And we keep innovating. We just launched a CryptoBlock™ allocation. Where the market points, we go.

VIEW MODELS

VIEW VIDEO

iSectors® LLC
THE FUTURE OF INVESTING

iSectors, LLC. • W6240 Communication Court, Suite 1, Appleton, WI 54914 • www.iSectors.com

Advisors outsourcing investment management create more revenue and are focused on where they can add the most value: client relationships. **iSectors** is an independent investment strategist that has developed a suite of proprietary exchange-traded fund asset allocation models created by advisors for advisors to help meet clients' unique and varying risk/return objectives.

These allocation models can be implemented in both separately managed and unified managed accounts for individuals and institutional qualified and non-qualified accounts, as well as trusts and endowments.

We leverage the technological infrastructure and support staff of our platform partners alongside our own investment management expertise to give advisors more time to get to know their clients and help them achieve their investment objectives. If you can optimize your business efficiencies, we've done our job.

iSectors strategies are rooted in our proprietary "Post-Modern Portfolio Theory" research, which allocates assets to achieve true diversification in the contemporary investment environment, going beyond conventional index assumptions in pursuit of lower correlations and more robust financial outcomes overall. Solutions are available for 401(k) programs and 3(38) fiduciary arrangements, as well as leading TAMP platforms.

Allocations are suitable as default investment selections for participants of various risk tolerances and age classifications. This allows advisors to map participants directly into a complete, diversified model appropriate for their goals and risk tolerance . . . while pursuing more tailored objectives like inflation protection, income and exposure to liquid alternatives, precious metals and other asset classes.

**New business contact:**
Scott Jones, Director of Business Development
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**Type of program:** Model Portfolio Delivery
**Total Assets Under Management:** $430 million
**Year program began:** 2008
**Managers GIPS® compliant:** Yes
**Models Tracked by Morningstar:** Yes
**Program is compatible for:** All investment professionals
**Types of Products Available:** iSectors Capital Preservation Allocation, iSectors CryptoBlock™ Allocation, iSectors Domestic Equity Allocation, iSectors Domestic Fixed Income Allocation, iSectors Endowment Allocation, iSectors Enhanced Aggressive Allocation, iSectors Enhanced Balanced Allocation, iSectors Enhanced Conservative Allocation, iSectors Enhanced Growth Allocation, iSectors Enhanced Income Allocation, iSectors Global Balanced Allocation, iSectors Global Conservative Allocation, iSectors Global Equity Allocation, iSectors Global Fixed Income Allocation, iSectors Global Growth Allocation, iSectors Inflation Protection Allocation, iSectors Liquid Alternatives Allocation, iSectors Post-MPT Growth Allocation, iSectors Post-MPT Moderate Allocation, iSectors Precious Metals Allocation, iSectors Tactical Global Balanced Allocation
**Clients Goals:** iSectors offers indexed-based ETF asset allocation models. The iSectors Global and Enhanced series of models are blended to achieve specific targeted risk return objectives. iSectors also provides models that are designed to meet specific needs and we encourage advisors to blend our allocation models to achieve unique client objectives.
**Strategies:** Dynamic Models, ETF Models, Risk-based, Smart-Beta, Strategic Models, Tactical Models, Targeted Fixed Income
**TAMPs Offering iSectors:** Envestnet, EQIS, ModelxChange/Mid-Atlantic FolioFN, Matrix, AdhesionWealth, GeoWealth, Orion, SMArtX, TD MMC/Schwab MMC, Sawtooth
**Marketing support offered:** Stat Sheets, Model Profiles, Executive Summaries, Webinars, Podcasts, Blog Posts, Quarterly Commentary, Brochures, Market Updates, and Model Updates