



Personalized Investment Solutions. World-Class Strategists with Specific Mandates.

As the retirement and investment landscapes evolve, our leadership role in the SDBA marketplace demands that we continually innovate. Strategy PLUS™ offers Models built and categorized by TPGF that utilize PFG Strategies. PFG Strategies are funds that invest in the underlying mutual funds and ETFs of several world class Strategists seen below. Strategy PLUS™ combines our firm’s long and successful asset allocation experience with an elite group of asset managers, giving you a way to offer expert guidance in all aspects of your client’s financial life.

Critical to Strategy PLUS™ is the guidance that only investment advisors can give. Participants of the ever-expanding group retirement plan market need knowledgeable, caring professionals that offer valuable advice with customizable options, not just the default options available in many plans.

Model Categories and Benefits:

- Target PLUS™ – An enhancement to target date funds; offering strategic, tactical, active and passive solutions
- Index PLUS™ – Active Models for those that prefer the benefits of passive investing +ESG
- Focus PLUS™ – Concentrated Models that invest in PFG Strategies focused on underlying funds and ETFs managed by single strategists
- Multi PLUS™ – Our most robust and diversified allocations of PFG Strategies
- RiskPro® – Technology that monitors every PFG Strategy and TPGF Model for Perpetual Suitability™

World Class Strategists



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See Important Disclosures



THE MODEL CATEGORIES



Target PLUS™ incorporates convenience and discipline, which has driven target date fund popularity. We've enhanced this process by merging Strategic and Tactical allocations with both Passive and Active underlying fund options. Customized individual risk budgets combined with this sophisticated investment process, elevates traditional target date investing.



Index PLUS™ brings active allocation to a passive strategy. Within our models, TPGF actively allocates between sectors, countries, and economic themes, utilizing PFG Strategies (which implement the underlying funds and ETFs of specific strategists). Tactical bond allocations are implemented through specific PFG income strategies, which emphasize minimal allocations to core bonds.



Focus PLUS™ gives advisors the ability to access concentrated Models that invest in PFG Strategies focused on underlying funds and ETFs managed by single strategists. Focus PLUS™ allows concentrated exposure to strategist's funds with longstanding track-records and styles that advisors and investors may know well and trust.



Multi PLUS™ offers our most robust and diversified allocations of PFG Strategies within Strategy PLUS™ Models to accommodate five different risk tolerance ranges.

ALLOCATIONS

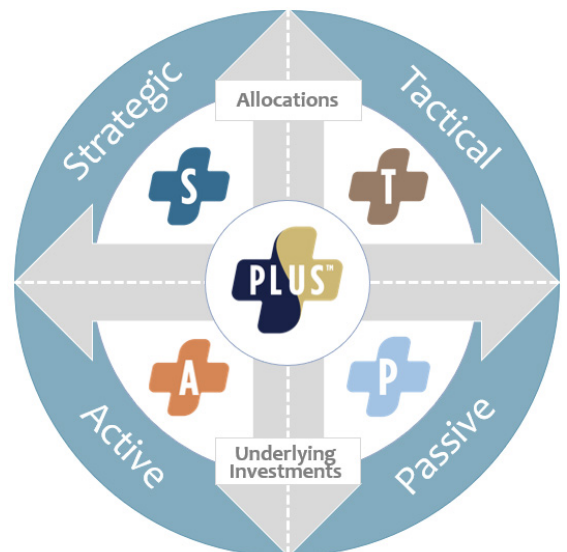
Strategic: An institutional Modern Portfolio Theory process focusing on correlations between designated asset classes with models based on historical risk levels with scheduled rebalancing.

Tactical: Active portfolio allocations using indicators such as momentum, trend following, and valuation with shorter term opportunities in mind. Focusing on reallocation versus rebalancing.

UNDERLYING INVESTMENTS

Active: Selection of individual issues (i.e., equities/ fixed income, ETFs) to create a portfolio that will reflect manager analysis and seeks alpha.

Passive: Creating portfolios based on an underlying index focusing on reduced tracking error and returns consistent with the chosen benchmark. Often lower costs than active management.



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RiskPro® is a software technology developed by ProTools, LLC, an affiliate of TPGF, to estimate the forward-looking, maximum annual range of total returns of a portfolio of securities (Tolerance). IMPORTANT: The projections or other information generated by RiskPro® regarding the likelihood of various outcomes are hypothetical in nature, do not reflect actual investment results and are not a guarantee of future results. Further, RiskPro® does not consider the fees and expenses of the underlying PFG Strategies, or the potential impact of extreme market conditions. There is no certainty that each Portfolio's maximum range of annual total returns, as estimated by RiskPro®, will be accurate or that the TPGF will succeed in managing each Portfolio's maximum annual volatility.

The information presented reflects a Model Portfolio, as of the date indicated, but does not reflect actual Client accounts. The Model Portfolio will differ from Client accounts based on factors such as the date of initial investment and the dates of actual contributions and withdrawals. TPGF Models consist of PFG Strategies, which are mutual funds managed by PFG, an affiliate of TPGF.