

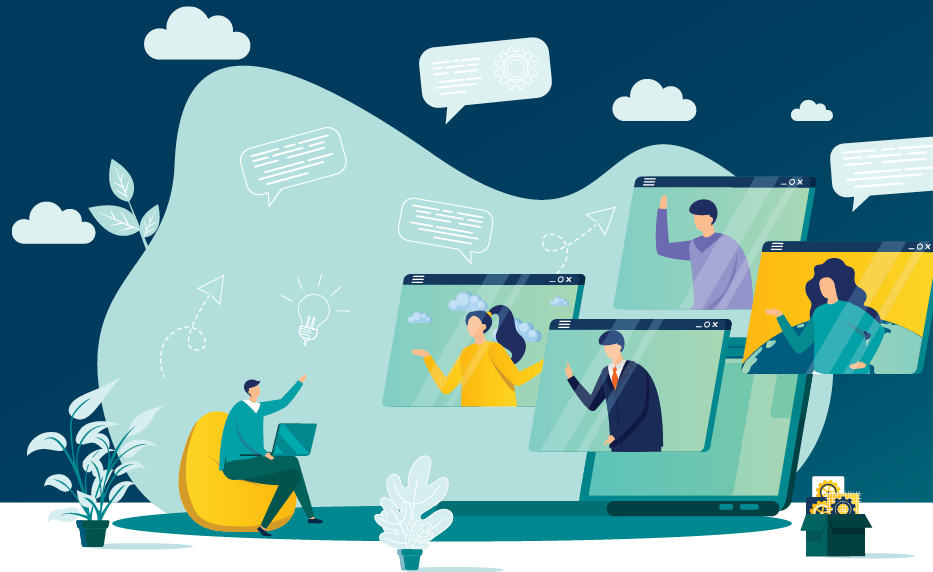
SYMMETRY®

# ADVISORFEST

EXPERIENCE • GROWTH • TRANSFORMATION

## Making the Most of Personalized Direct Indexing

*Powered by Symmetry Axiom*



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Presented by:

**Philip McDonald, CFA, CAIA, CIPM**  
President, Managing Director,  
Portfolio Manager

**Tom Romano**  
Director, National Sales

# How We Support Advisors

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SYMMETRY®

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graph TD; SYMMETRY[SYMMETRY®] --- IM[Investment Management]; SYMMETRY --- P[Platform Services & Support]; SYMMETRY --- A[Additional Advisor Services];
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SYMMETRY®

Investment  
Management

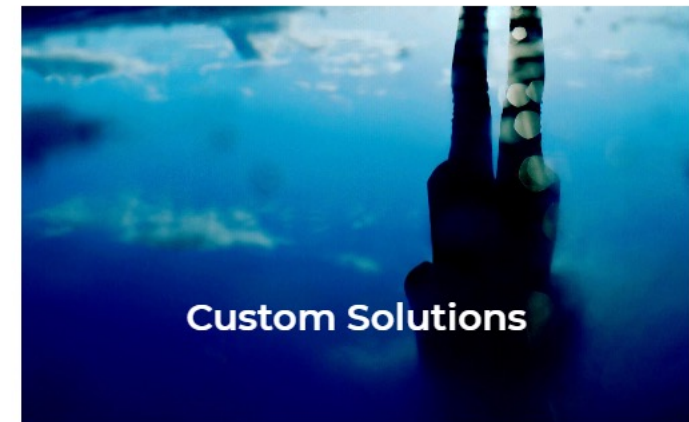
Platform Services &  
Support

Additional Advisor  
Services

# Symmetry MF/ETF Solutions

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SYMMETRY®



# Introducing *Symmetry Axiom*

SYMMETRY®

## Personalized Client Solutions



### Custom Platform

- Custom suite of apps & tech integrated w/ Orion.

### Flexible Portfolios

- Individual stocks
- Symmetry & Apella solutions & components
- Other securities

### Streamlined Process

- Exclusions/ Inclusions incl. ESG/SRI
- Risk Tolerance
- Integrated w/ financial plan

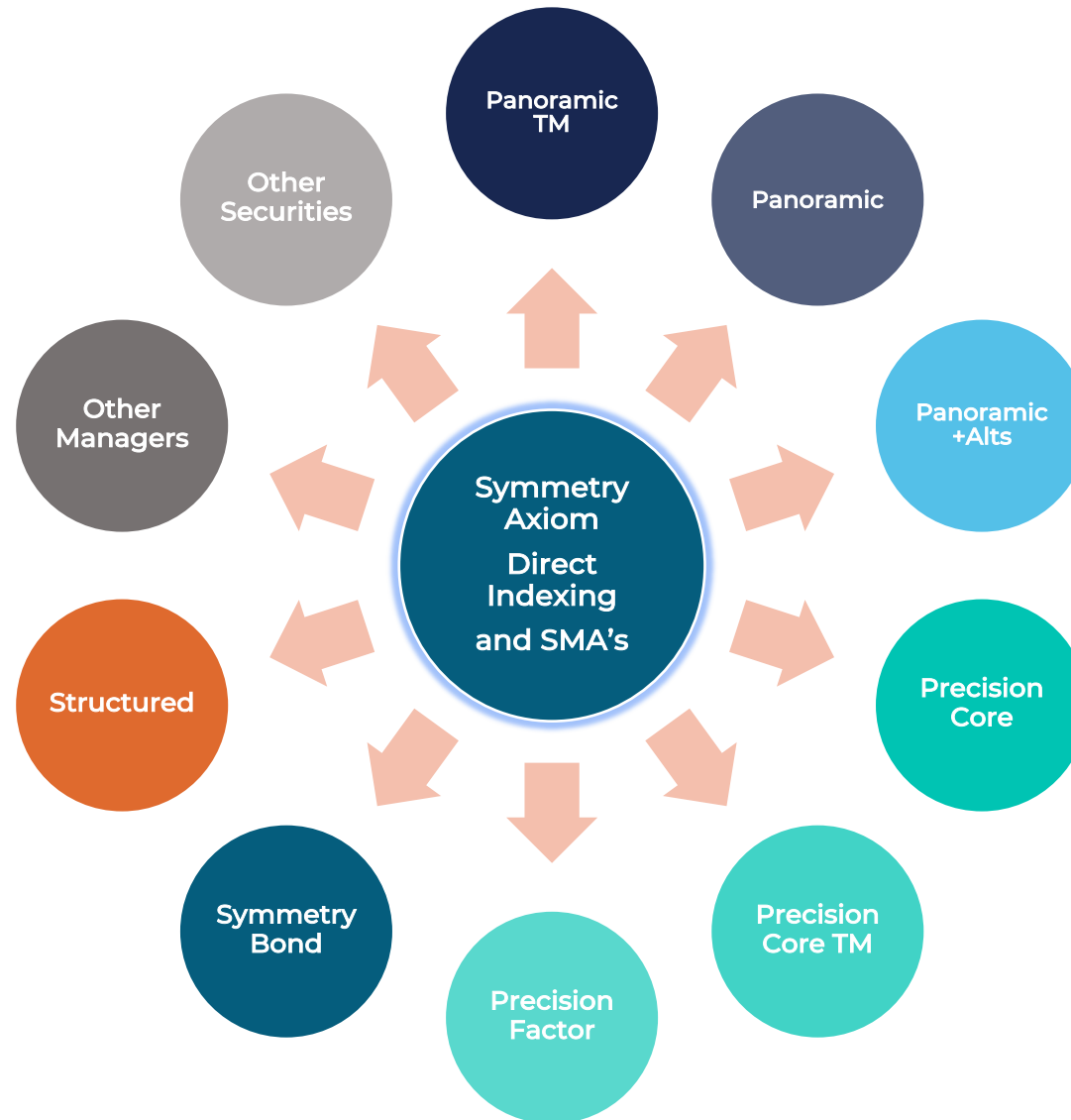
### Marketing & Education

- Brochure
- Educational presentations
- Commentary

### Integrated Monitoring & Reporting

- Reporting across portfolios/sleeves
- Ongoing due diligence
- Rebalancing methodology

# Symmetry's Flexible Portfolios



## Tomorrow - Practice Management

**11 AM ET / 8 AM PT**

### Building a More Scalable & Profitable Business

*Robert Hawke, Director of Operations & Technology*

*Lissette Lojewski, Associate Director Advisor Experience*

**2 PM ET / 11 AM PT**

### Buying, Selling, & Valuing Practices

*Robert Martin, Managing Director*

*Jim Scanlan Jr, Director of Finance & M&A*



# Questions?

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Thank You

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ESG (Environmental, Social and Governance) Investing Risk: ESG Investments may not be perfectly correlated to the broader market indexes they seek to replicate. Stocks screened by the index sponsor for ESG criteria may underperform the stock market as a whole or particular stocks selected for the Index will, in the aggregate, trail returns of other funds investment strategies screened for ESG criteria. The individual companies deemed eligible by the index provider may not reflect the beliefs and values of any particular investor and may not exhibit positive or favorable ESG characteristics. The components of the Index are likely to change over time.

Axiom Program Risks: The Symmetry Axiom program provides clients with individual security portfolio solutions designed around individual client preferences. The Axiom separately managed accounts (Axiom SMAs) can be index- or factor-based. The index-based solutions are designed to give clients exposures similar to popular market indices, with far fewer individual security positions. The factor-based solutions are designed to emphasize those factors [need to define/describe factors or refer to somewhere in the ADV where they are already described] the Research/Portfolio Management team believes will optimize risk-adjusted return. Both the index-based and factor-based portfolios hold individual securities.

Tax-loss harvesting involves certain risks, including, among others, the risk that the new investment could have higher costs than the original investment and could introduce portfolio tracking error into your accounts. There may also be unintended tax implications. Prospective investors should consult with their tax or legal advisor prior to engaging in any tax-loss-harvesting strategy.