

STANDARD

- **Timely Economic, Market and Investment Strategy Commentaries**
- **A Comprehensive Equity Package** including:
 - Equity Guidance List covering approximately 210 large cap companies (weekly)
 - Daily Equity Research Summary
 - Equity Investors' Weekly
 - Sector Views (monthly)
- **Benchmark Index Returns** (monthly)
- **Capital Markets Assumptions Five Year Outlook** (annually)
- **Asset Allocation Models** for both strategic and tactical time horizons (monthly)
- **Fixed Income Commentary** (weekly/monthly)
- **Fixed Income Guidance List** including suggested Treasuries, agencies and corporates (weekly)
- **Model Active Fixed Income Portfolio** – a diversified, core fixed income portfolio that balances total return and income and offers price stability
- **Client Meeting Support** for all research and asset allocation recommendations
- **Portfolio Construction Support**
- **Monthly Equity Update Webinar with Northern Trust Equity Research Analysts** highlighting our sector outlook, trends and top picks (monthly)
- **Economic Update, Asset Allocation Update and Fixed Income Update Webinars** with Northern Trust senior strategists and leadership
- **Distinguished Speaker Series Webinars** with Northern Trust subject matter experts (quarterly)
- **Invitation to the annual Northern Trust Asset Management Investment Institute conference** for all registered users
- **Investment Institute Website and Mobile App Access** for up to 10 registered users enabling on-demand access to program materials
- **Multi-Channel Content Delivery** (web, mobile app, email, webinars and live events)

PREMIER

- **All Standard Service Components**
- **Model Equity Portfolio** – a fundamentally driven, high-quality Large Cap Core model portfolio
- **Access to Northern Trust Subject Matter Experts** via an email-based Premier Hotline providing instant access to our experts (including our Equity Research Analysts) for questions and call back requests
- **Asset Allocation Support** - direct access to Northern Trust's investment strategy team and Investment Solutions Group
- **Investment Committee Data Pack** - an in-depth analysis of global economic and financial market variables combined with our 12-month asset class return forecasts and tactical asset allocation recommendations to support your Investment Committee meetings (monthly)
- **White Label Market Insights** customized with your logo and contact information to support communication with your client base
- **Investment Institute Website and Mobile App Access** for 10 additional users (20 users total – additional users negotiable)



LET OUR EXPERTS BE YOUR EXPERTS

Schedule a tour to learn more about growing your business with the support of the Investment Institute. Contact your **Northern Trust Relationship Manager** or **NTAMISolutionsExperts@ntrs.com**, or visit us at **NTAMInvestmentInstitute.com**

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