INVESTMENT INSTITUTE

Member Service Level Overview

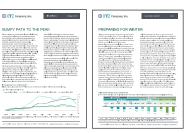
STANDARD

- 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 NTAMIISolutionsExperts@ntrs.com, or visit us at NTAMInvestmentInstitute.com

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