NORTHERN TRUST
ASSET MANAGEMENT

CUSTOM PORTFOLIO SOLUTIONS

Navigate capital market complexities with custom portfolio solutions tailored to your objectives and preferences.

Northern Trust Asset Management's Custom Portfolio Solutions program combines our time-tested asset allocation, portfolio construction and institutional portfolio management expertise with world-class open architecture fulfillment and a strategic partnership approach.

Leveraging a deep network of external investment managers, proprietary quantitative and fundamental strategies, and a thoughtful selection of passive and active funds, we seek to deliver institutional-caliber solutions along with ongoing, holistic investment advice to help solve intricate portfolio challenges – and most importantly, help you achieve your investment goals.

Our custom portfolio solutions are offered on a consultative basis, or as a discretionary program in which we assist with implementation, rebalancing and ongoing reporting. In both scenarios, dedicated portfolio managers regularly review the portfolio's strategic and/or tactical allocation(s), and can provide market commentary and actionable insights to help achieve the portfolio's objectives.

Furthermore, our custom portfolio solutions can be implemented on a variety of platforms.

CLIENT-CENTRIC OBJECTIVES:
- Return / Risk Expectations
- Liquidity Needs & Time Horizon
- Strategic / Tactical Management
- Active / Passive Preference
- Alternatives Mandate
- Sustainable Investing Objectives

ASSET ALLOCATION:
- Capital Market Assumptions
- Top-Down Views with Bottom-Up Insights
- Time-Tested, Proven Expertise

EFFICIENT OPEN ARCHITECTURE FULFILLMENT:
- Fundamental / Quantitative
- External & Internal Managers
- Exchange Traded Funds
- Mutual Funds
- Separately Managed Accounts
- Private Investments

Innovative portfolio design along with prospecting, onboarding, monitoring and reporting services

Client-Centric Portfolio Solutions

Completion Solutions: Single- or multi-asset class solutions designed to complement existing portfolio mandates.

Total Return Solutions: Multi-asset class portfolios designed as a comprehensive investment solution.

Targeted Solutions: Solutions leveraging multiple strategies in an effort to deliver a specific return, duration, yield, etc.

Rebalancing Solutions: Efficient portfolio rebalancing using custom parameters.

Client-Centric Portfolio Solutions			
Completion	Total Return	Targeted	Rebalancing

Additional Services		
Prospecting	Onboarding	Reporting

Additional Services

Prospecting

- RFP Assistance
- Portfolio Assessment
- Asset Allocation Study
- Investment Policy Analysis

Onboarding

- Onboarding Process Guidance
- Account Setup
- Finalize Strategic and/or Tactical Allocations

Reporting

- Ongoing Monitoring
- Composite Reporting
- Performance Assessment
- Rebalancing

PUT OUR EXPERTISE TO WORK FOR YOU

To learn more about Northern Trust Asset Management's custom portfolio solutions, contact your Northern Trust Relationship Manager or NTAMIISolutionsExperts@ntrs.com, or visit us at NTAMInvestmentInstitute.com.