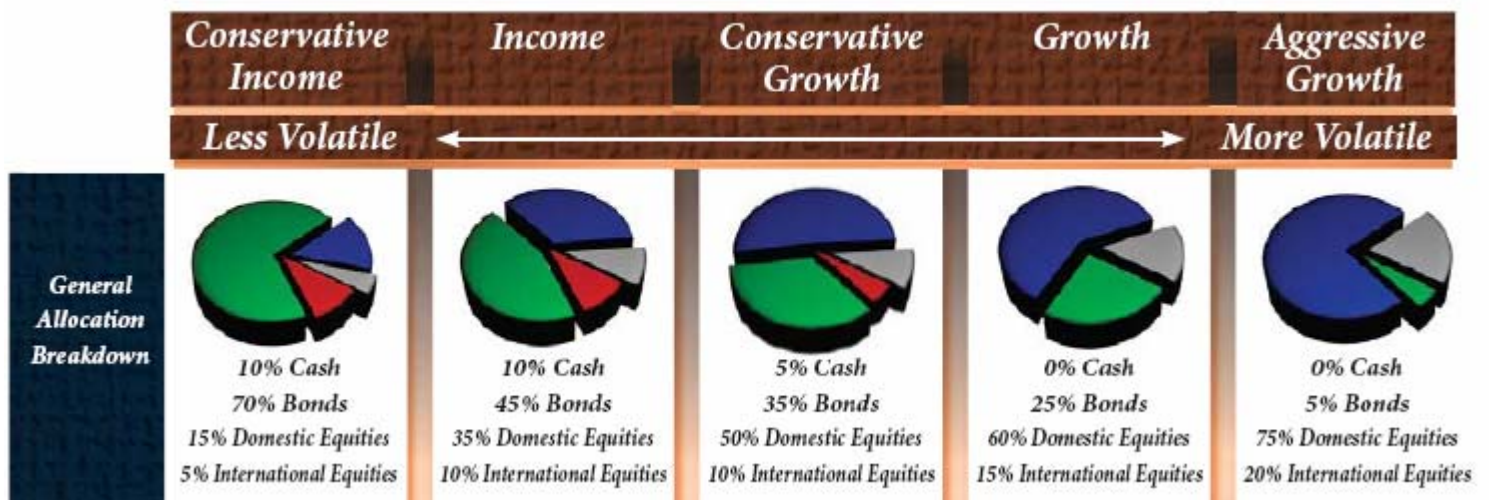


AssetAllocation Brokerage Platform Information



The “AssetAllocation Brokerage” platform is a professionally fee-based separately managed accounts program for assets held at RBC or NFS clearing firms. No matter the type of account, Creative Financial Designs, Inc. can manage the investments based on the clients risk tolerance and investment goals in one of five portfolio risk models. Within the “AssetAllocation Brokerage” platform, our investment options are nearly limitless, with approximately 20,000 mutual funds, ETF’s, NTF funds, listed securities, closed-end funds, bonds (all types), CD’s, money markets, and more. We offer five separate investment strategies so the client and adviser can choose which investment vehicles are right. Based on your client’s risk tolerance, time horizon, and specific goals, we will build a diversified portfolio that can be customized and built to maximize returns and minimize risks.

Our Five Risk Tolerance Portfolios



Our Five Investment Holding Strategies

Investment Holdings

This will determine which type of investments your account will be holding. You can choose between:

- Mutual Funds Only (minimum \$25K account size)
- Individual Equities (minimum \$60K account size)
- Combination of Mutual Funds, Individual Equities, and ETF's (minimum \$60K account size)
- Exchange Traded Funds (ETF's) (minimum \$25K account size)
- NTF (only available through NFS) (minimum \$25K account size)