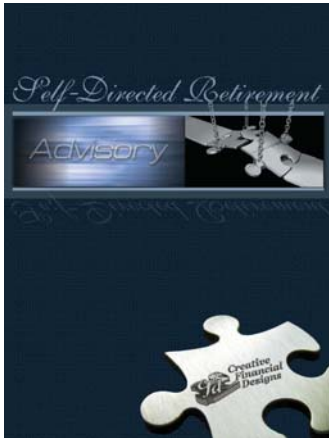
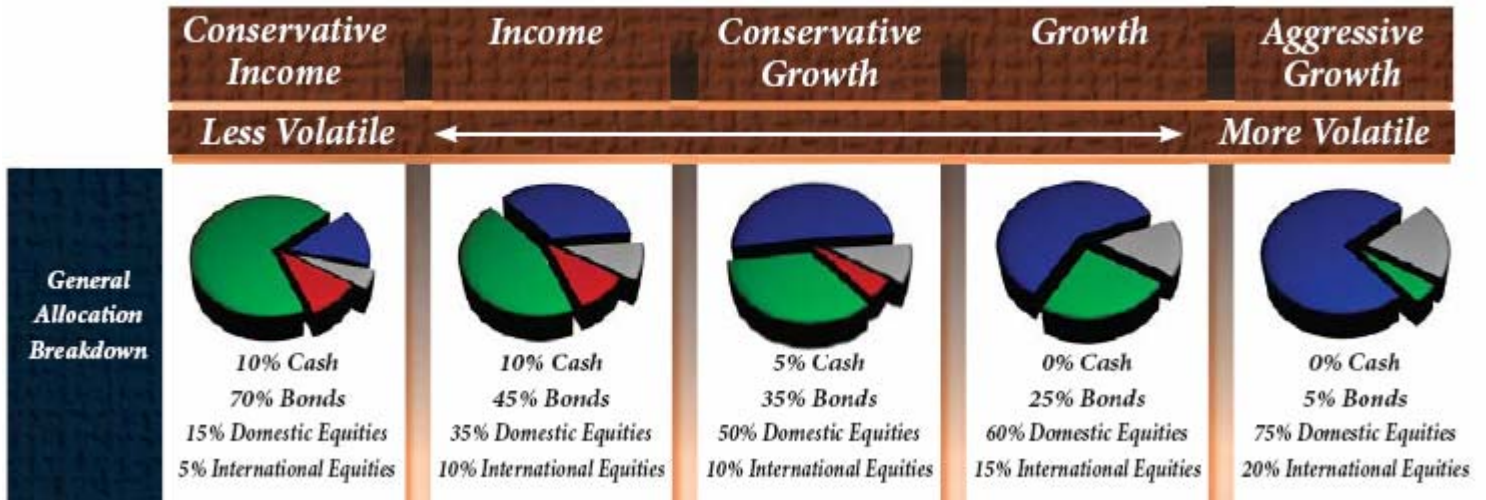


Self-Directed Retirement Advisory Platform Information



The Self-Directed Retirement Advisory platform offers the service of professional investment management for all client's with custodian held 401(k)'s, 403(b)'s, 457, etc. through their company's retirement program. Creative Financial Designs, Inc. will build one of five portfolio models based on the client's risk tolerance, time horizon, and specific goals. Clients and advisers have two separate investment strategies to choose from to meet their client goals, "Passive" and "Active". As long as internet access and online trading is available you can provide your client's a peace of mind and a valuable needed service.

Our Five Risk Tolerance Portfolios



Our Two Management Strategies

"Active" Management	"Passive" Management
<p>Brief Description of Service: Professionally managed accounts team providing an on-going active management strategy of clients self-directed company retirement accounts based on clients risk tolerance.</p> <p>Additional Benefits Compared to Passive Strategy:</p> <ul style="list-style-type: none"> • Management team is actively monitoring the clients portfolio with their risk tolerance. • Management team is actively monitoring currently held portfolio of investments. • Management team is actively monitoring all available investment options (and new investment choices). 	<p>Brief Description of Service: Professionally managed accounts team providing a quarterly passive management strategy of clients self-directed company retirement accounts based on clients risk tolerance.</p> <p>Benefits for Clients:</p> <ul style="list-style-type: none"> • Management team rebalances account quarterly within the clients risk tolerance. • Management team evaluates investments within the plan at least annually. • Professional management team is passively monitoring their retirement account.