

## Program at a Glance



# Morningstar Managed Investments

Exclusively on the  
**BRIDGEHOUSE**  
INDEPENDENT PLATFORM

## Multi-Asset Portfolios

### Objective Selection of Top 3<sup>rd</sup> Party Managers

#### Asset Allocation

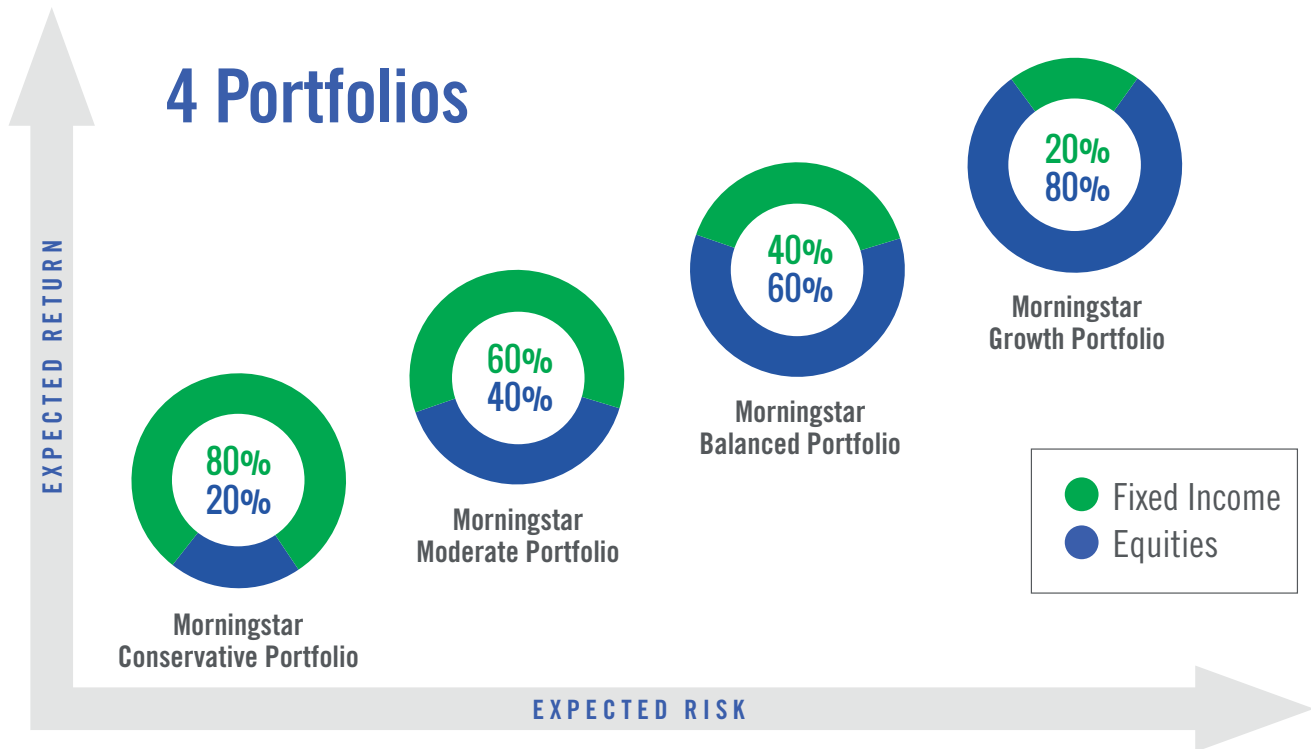
- Morningstar's valuation-driven approach
- Avoids overvalued market areas
- Pursues undervalued market areas

#### Portfolio Construction

- Uses active where active works best
- Uses ETFs where passive works better
- Mutual funds, pooled funds, ETFs

#### Monitoring/Adjusting

- Allocation to fixed income and equities can vary +/- 15%
- Aligned with 4 Investor Risk Profiles



## Access to Top Managers



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