

### Advisor123

Rules-based, emotion-free approach to investment management, with an added focus on cost-efficiency.

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ADVISOR | 123



### Alpha Architect

Alpha Architect turns academic insights into investment performance using a transparent, systematic, evidence-based process.

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 alpha architect



### Altruist

Scale your practice with fully-integrated model portfolios focused on low cost and tax efficiency.

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 Altruist



### Aptus Capital Advisors

Risk-managed strategies designed to help clients stay invested through the ups & downs of market cycles.

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 APTUS CAPITAL ADVISORS



### BlackRock

Dynamically managed model portfolios, focusing on diversification across asset classes.

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**BlackRock.**



### Capital Group

Model portfolios built for long-term objectives that reflect active investment decisions across each underlying fund.

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 CAPITAL GROUP®



### Factor Portfolios

The Dimensional approach is grounded in economic theory and backed by decades of empirical research.



### Fidelity Investments

High-quality investment management at a low cost. Less time managing portfolios, more time with clients.



### Goldman Sachs

Strategic, long-term approach with tactical views that seeks to balance risk and return while navigating changing markets.



### HIP Investor Inc.

ESG-focused, diversified fossil-free portfolios for climate action while pursuing optimal risk-adjusted returns.



### Invesco

Easy-to-implement portfolio solutions constructed by the expertise of a leading global asset management firm.



### Markin Asset Management

Systematic portfolios built for long-term outcomes investors value: less exposure to loss, more reward-to-risk, tax efficiency.





### Morningstar Investment Management

Portfolios driven by their unique valuation approach with a range of risk exposures and investment objectives.



### Newfound Research

Unlock the benefits of diversification via capital-efficient investment solutions and alternative return streams.



### PIMCO

Fixed income models designed for capital preservation, equity diversification, and income generation.



### Potomac

Portfolios that "Win by Losing Less," and deliver competitive returns by limiting maximum drawdown.



### Redwood Investment Management

The Redwood RiskFirst® approach is built to manage drawdowns within pre-defined limits.



### Seeds Investor

Personalized separately managed accounts that empower advisors to deliver a more meaningful investing experience.



### State Street Global Advisors

Portfolios that provide global diversification based on their target balance of risk and return.

**STATE STREET** GLOBAL ADVISORS



### Vanguard

Broadly diversified, low-cost index portfolios from a company you trust.

**Vanguard**



### Zacks Investment Management

Delivering results by seeking excess returns over standard benchmarks within a risk-controlled framework.

**Zacks**  
INVESTMENT MANAGEMENT



Altruist LLC and its affiliates (together, "Altruist") and the Model Marketplace model providers do not render investment advice to retail clients, rather Altruist makes available certain model portfolios for independent RIAs' use in managing their retail investment clients' assets. RIAs are responsible for suitability of all transactions in and decisions regarding client accounts, and must maintain discretion over client accounts which are subscribed to Model Marketplace model portfolios.

Certain instructions from model providers who are providing models to the Altruist Model Marketplace may not be executed based on system limitations. Performance of individual accounts assigned to a model portfolio may deviate from the target model performance based on a number of factors including rebalancing settings and timing, and amount of cash flows.

For more information on Altruist's Model Marketplace please see the Form ADV Part 2A, Model Marketplace Agreement and Altruist LLC Fee Schedule on [altruist.com/legal](https://altruist.com/legal). The Model Marketplace utilizes Altruist's Rebalancer and may utilize Altruist's Tax Management Features. See Rebalancer and Tax Management Features Disclosures on [altruist.com/legal](https://altruist.com/legal) to learn more.