



CONSULTING SERVICE AND DELIVERABLE MENU

Program Levels		Silver	Gold	Platinum	Diamond
Consulting Team Access		Team	Dedicated Strategist	On-Demand Strategist	On-Demand Strategist
One-Time Deliverables	Current Model Analysis	x	x	x	x
	Current Fund Review	x	x	x	x
	Proposed Model Analysis	x	x	x	x
	Proposed Model Framework & Holdings	x	x	x	x
	Investment Policy Statement Assistance	x	x	x	x
	Additional Customized Models			x	x
Ongoing Deliverables	Quarterly Investment Committee Meeting Guidance		x	x	x
	Quarterly Performance Executive Summary		x	x	x
	Quarterly Sleeve Performance Summary Quarterly		x	x	x
	Market Review & Outlook Call		x	x	x
	Long-Term Historical Portfolio Analysis Updates		x	x	x
	Drafts of Meeting Minutes		x	x	x
	Investment Product Research & Due Diligence		x	x	x
	Buy/Sell Watch List		x	x	x
	Strategic Asset Allocation		x	x	x
	Forward Looking Capital Market Assumptions		x	x	x
	Manager Monitoring Report		x	x	x
	SMA Monitoring Report		x	x	x
	Model Transition Support		x	x	x
	Recorded Quarterly Investment Committee Meeting		x	x	x
	Portfolio Modeling		x	x	x
	Large Case Consultation		x	x	x
	Model Goal Tracker		x	x	x
	Performance Tracker			x	x
	Portfolio Attribution Reports			x	x
	Custom Quarterly Market Review & Outlook			x	x
	Horizon Ranking Analysis			x	x
	Access to Horizon's Portfolio Managers			x	x
	Customized Market Indicators			x	x
	Ongoing Portfolio Commentary				x
	Scenario Testing				x
	Performance Tracker (Daily/Weekly)				x
	Monthly Portfolio Review				x
	Client Support				x



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Marketing	Goals-Based Flyer		x	x	x
	Goals-Based Brochure		x	x	x
	Firm Flyer		x	x	x
	Firm Brochure (Tri-fold)		x	x	x
	Why Goals Based Presentation		x	x	x
	Weekly Market Commentary (for client distribution)		x	x	x
	Branded Quarterly Focus Commentary			x	x
	White-Label Resources			x	x
	Presentation Support			x	x
	Website & Digital Marketing Support			x	x
	Video Filming				x
Sales & Business Development	Office Visits	x	x	x	x
	Home Office Access for Client Event/Meetings		x	x	x
	Business Consulting		x	x	x
	Video Webinars for Client Events			x	x
	Horizon Executive Team Access			x	x
Technology	Horizon Dashboard Access	x	x	x	x
	Resource Center	x	x	x	x
	My Models Dashboard		x	x	x
	Beta-Testing Access to New Horizon Tools			x	x
	White-labeled Horizon Dashboard				x
	Technology Consultation				x