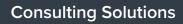




	Program Levels	Silver	Gold	Platinum	Diamond
	Consulting Team Access	Team	Dedicated Strategist	On-Demand Strategist	On-Demand Strategist
One-Time Deliverables	Current Model Analysis	Х	Х	Х	х
	Current Fund Review	Х	х	х	х
	Proposed Model Analysis	Х	×	х	х
	Proposed Model Framework & Holdings	Х	х	х	Х
	Investment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



HORIZON INVESTMENTS®

	Program Levels	Silver	Gold	Platinum	Diamond
	Consulting Team Access	Team	Dedicated Strategist	On-Demand Strategist	On-Demand Strategist
	Goals-Based Flyer		Х	Х	Х
	Goals-Based Brochure		Х	х	х
	Firm Flyer		х	х	х
_	Firm Brochure (Tri-fold)		х	х	х
Marketing	Why Goals Based Presentation		х	х	Х
	Weekly Market Commentary (for client distribution)		х	х	х
Mai	Branded Quarterly Focus Commentary			х	Х
	White-Label Resources			х	Х
	Presentation Support			х	Х
	Website & Digital Marketing Support			х	Х
	Video Filming				Х
int	Office Visits	Х	Х	Х	Х
Sales & Business Developement	Home Office Access for Client Event/Meetings		х	х	х
Sales & Business velopeme	Business Consulting		х	х	х
Sa Bus velo	Video Webinars for Client Events			х	х
De	Horizon Executive Team Access			Х	Х
Technology	Horizon Dashboard Access	х	Х	Х	х
	Resource Center	Х	х	х	х
	My Models Dashboard		х	х	Х
	Beta-Testing Access to New Horizon Tools			х	х
	White-labeled Horizon Dashboard				Х
	Technology Consultation				х

Services listed are as of the date below and availability may be limited. Please contact us to discuss service levels and eligibility. All investing involves risk. Horizon Investments and the Horizon H are registered trademarks of Horizon Investments, LLC. © 2022 Horizon Investments, LLC HICSM-1122