



Investment Program & Research Platform

Whether you have a fully developed investment approach, are looking to improve your current approach or are seeking a new investment program, Cue works with you to align your investment program with your clients' needs. Cue's Investment Committee directs investment strategies that are fundamentally sound, low-cost, and tax-efficient. The Cue platform can help you focus on what's most important to you—your business and your client relationships.

INVESTMENT PORTFOLIOS

- Able to meet a broad range of client needs and risk tolerances
- Asset allocation modeling to balance risk and return as appropriate:
 - Capital Markets Expectations
 - Efficient portfolios
- Broad global diversification
- Full spectrum of portfolios for a range of risk tolerances
- Use our portfolios or let us assist you in developing your own
- Institutional share classes to reduce cost

TOOLS AND TECHNIQUES

- Ongoing tax management to help maximize after-tax returns
- Extensive resources available for more complex opportunities:
 - Separate account managers for specialized assignments
 - Sophisticated alternative investment platform at reduced minimums

- In-house databases:
 - Access to multiple resources for searches, screening, performance analysis
- Strong IT platform for rebalancing and performance reporting

INVESTMENT COMMITTEE

- Four-member committee, all with deep institutional money management backgrounds, averaging more than 20 years each
- Unbiased, objective research of broad universe of investment opportunities
- Due diligence into and ongoing monitoring of investments, managers, and mutual funds
- Available to meet and consult with you

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