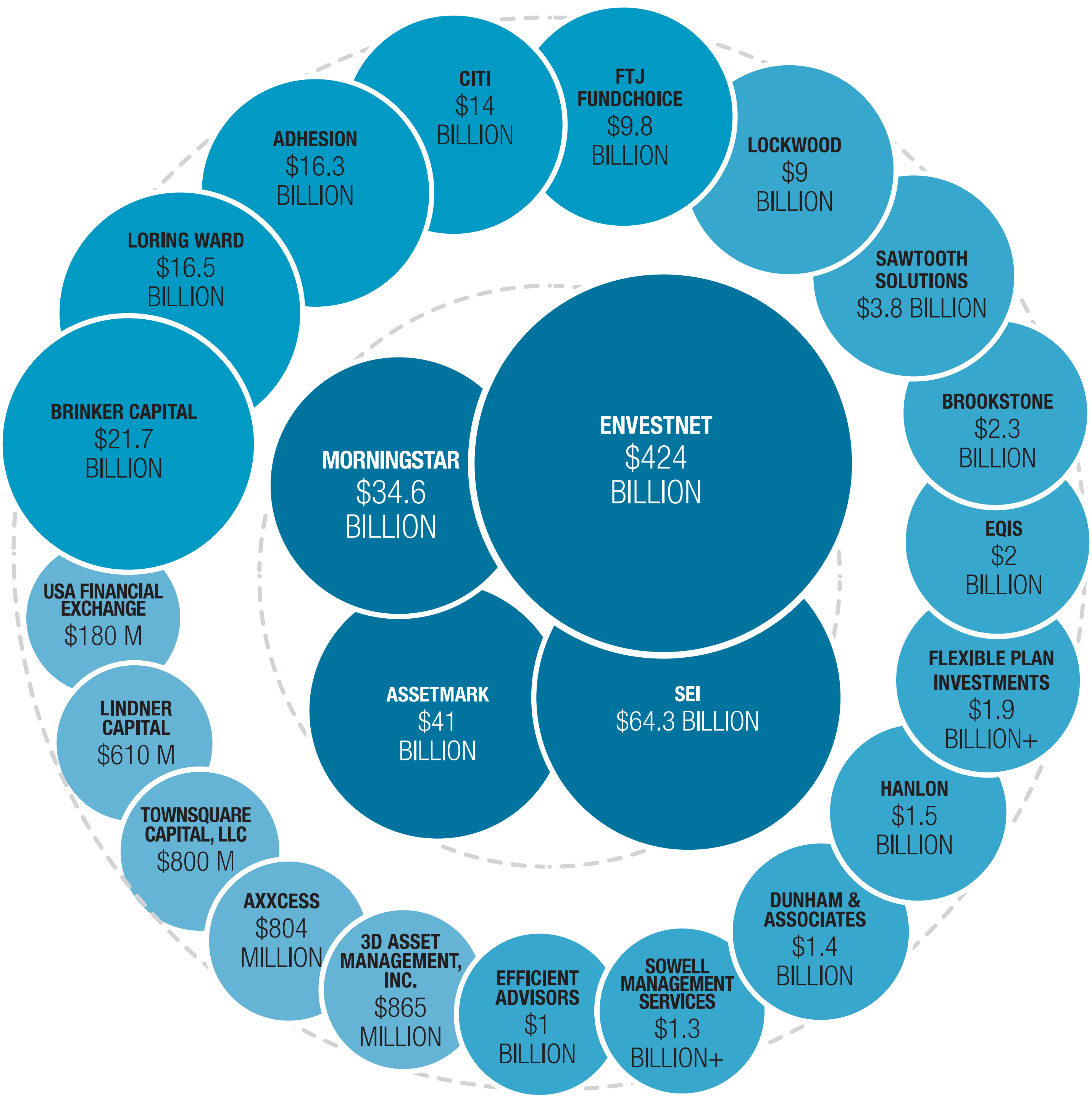
2018 AMERICA'S BEST

TAMPS

YOUR INSIDE LOOK AT THE BEST TURNKEY ASSET MANAGEMENT PROGRAMS FOR FINANCIAL ADVISORS, FAMILY OFFICES AND BROKER-DEALER REPRESENTATIVES.

WEALTHADVISOR
THE VOICE OF THE FINANCIAL ADVISOR COMMUNITY

TAMPS BY PLATFORM ASSETS



TownSquare Capital, LLC • 5314 River Run Dr., Suite 300, Provo, UT 84604 • www.townsquarecapital.com

TownSquare is an independent, outsourced CIO / Investment Team for family offices, wealth advisors, corporations, governments, and foundations.

POWERFUL AND FLEXIBLE SUITE OF SERVICES

- Full spectrum of investment management and back office services including:
  - Money manager vetting and ongoing evaluation
  - Portfolio construction, monitoring, and re-balancing
  - Prospective client portfolio audits via our proprietary program
  - Case design, proposals and point-of-sale presentation
  - Full service trading desk including tax-optimization services and strategies
  - Back offices services including fee-billing, reporting and compliance functions
- Our services are offered either a-la-carte or as a turn-key investment and operations team.

EXPERIENCED TEAM / INSTITUTIONAL KNOWLEDGE

- Investment committee professionals average 25 years asset management and capital markets experience at top Wall Street firms.
- Current and past clients include Fortune 500 companies, governments, banks, foundations, endowments, and high-net-worth families.

INVESTMENTS BUILT FOR PERFORMANCE AND UNDERSTANDING

- We add alpha with a fundamental, bottoms-up investment process and engage the industry's best institutional money managers.
- We strive for 100% cost and investment transparency.
- Our process allows clients to understand and have confidence in the high-quality assets they own.
- We keep costs as low as possible while optimizing for tax efficiency.

BEST OF BREED MONEY MANAGERS

TownSquare arms its advisors and clients with a focused platform of best-of-breed investment strategies. Every investment strategy passes a rigorous due diligence process and strict set of criteria prior to approval including:

- A 10-year minimum track record
- Semi-concentrated portfolios with high active-share
- Tax friendly management (lower excess trading and turnover)

New business contact:
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Brand of program: TownSquare Capital

Type of program: TAMP; Sub-Advisory

Total assets in program: $800 million

Year program began: 2017

Managers on platform vetted: Yes

Managers GIPS compliant: Most

Type of products available: SMAs

Program uses platform to track reporting of client holdings: Yes

Program is compatible for: Independent RIAs, Independent Wealth Advisors, Institutions, Family Offices

Program optimizes for tax and trading efficiency: Yes

Sleeve-level reporting: Yes

Program links to a trade execution or order management system: Yes

Program links to a trust accounting system: Yes

Private branding or white labeling possible: Yes

Proposal generator: Yes

Generates investment policy statements: N/A

Asset allocation methodologies: Institutional Style Management via SMAs; Low Cost ETF Asset Allocation

Rebalancing: Yes

Aggregation of held-away accounts: No

Custodians supported: TD Ameritrade Institutional; Charles Schwab

Marketing support offered: Yes

Marketing support: Hands on training, proposal generation, point-of-sale