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PRODUCT	FINDER

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You've got goals. We've got solutions.

Forward-thinking investors have more advanced needs. We provide a diverse selection of strategies and personalized wealth management solutions to meet them.

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ASSET CLASS

Income

All

Taxable Income

Tax Advantaged/Municipal Income - National

Municipal Income - State

Municipal Income - National

Floating-Rate Loan

Multi-Sector

Equity/Hybrid

All

Domestic Equity

Equity Income

Global/International Equity

Multi-Asset

Tax-Managed Equity

Dividend Income

Option Income

Alternative

All

Absolute Return

Other Alternatives

Alternatives

CRESET SELECTOR

SEPARATELY MANAGED PORTFOLIOS

These highly customized portfolios offer a range of solutions to address the specific goals of high-net worth investors.

Fixed Income

• Equity





LEARN MORE

YOUR ANNUAL TAXABLE INCOMEA	your ordinary in	vestment income?
CR show maximum tax rates for where you live	YOUR TAX FILING STATUS®	YOUR RESIDENCE California
^{FEDERAL INCOME} s TAX RATE* 37.00% + 73	TATE INCOME TAX RATE TAX 3.30%+ 3.0	DERAL NII KRATE****
TOTAL T	AX RATE	
54.1	10.	
INVESTMENT TAX CAI		2

No one likes a surprise when it comes to money. Review your income tax

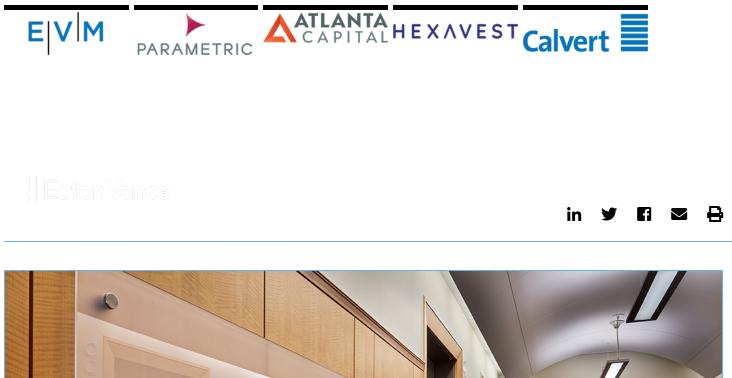
liabilities to avoid confusion surrounding today's tax code.

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