

4THOUGHT FINANCIAL GROUP

Multi-Method Investing

Bear Markets ♦ Bull Markets ♦ Wolf Markets ♦ Eagle Markets



Multiple Investment Methods With A Shop On The Innovation Frontier

We offer advisors a "Think Outside the Style Box" mentality to create all-weather portfolios prepared for Bull, Bear, Wolf, and Eagle markets:

- Liability-Driven Investing
- Opportunistic Investing
- Strategic Asset Allocation
- Selective/Concentrated Investing

GIPS Compliant Performance Reporting

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A Formulaic, Data-Driven Investment Process And A Team Structure

Our portfolio modeling process starts with creative proprietary research and empirical data analysis. Our findings are used to generate decision making formulas that are able to rapidly and repeatedly analyze vast quantities of raw data and drive our buy/sell/allocation decisions in tune with the specific investment mandates of each of the separately managed accounts offered. Our team includes a Chief Investment Officer, an Investment Committee, and appointed Portfolio Team Members who are cross-trained in all aspects of the portfolio decision making process and trading to ensure continuity and smooth succession for our client firms.

Morningstar Separate Account Research Availability

Morningstar currently reports on all of our Separately Managed Account composites through their US Separate Account research database, so that you can access info on our SMAs independently and begin your own research process.

Specialized Strategies for Multi-Account Portfolios

<p>LIABILITY-DRIVEN INVESTING</p> <p>Fixed Income</p>	<p>Fixed Income Plus Tax Neutral 100% Credit</p> <p>Custom Liability-Driven Investing Custom Mix</p>	<p>STRATEGIC ASSET ALLOCATION</p> <p>Equity and Alternatives</p>	<p>Traditional Strategic Allocation 100% Equities</p> <p>Global Strategic Allocation 60-100% Equities, 0-40% Other</p>
<p>OPPORTUNISTIC INVESTING</p> <p>Liquid Alternatives to Hedge Funds</p>	<p>Opportunistic Unconstrained Allocation 100% Unconstrained</p>	<p>SELECTIVE/ CONCENTRATED INVESTING</p> <p>Liquid Alternatives to Private Equity</p>	<p>Selective Stock Allocation 100% Equities</p>

Turnkey Strategies for Complete Single-Account Portfolios

<p>TRADITIONAL DIVERSIFIED ALLOCATIONS</p> <p>US-Centric Stock/Bond Mix</p>	<p>Traditional Strategic Allocation 100% Equities</p> <p>Traditional Aggressive Allocation 25% Credit, 75% Equities</p> <p>Traditional Moderate Allocation 50% Credit, 50% Equities</p> <p>Traditional Conservative Allocation 75% Credit, 25% Equities</p>	<p>MULTI-METHOD DIVERSIFIED ALLOCATIONS</p> <p>Global Stock/Bond/HF/PE Mix</p>	<p>Multi-Method Unconstrained 100% Unconstrained</p> <p>Multi-Method Constrained 50% Credit, 50% Unconstrained</p>
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**Systematic Investing
 Specialization: The 4Thought
 Difference**

We consider ourselves advocates for the idea of systematic savings and investment, and we have developed focused proprietary strategies to potentially maximize the benefits of this process for our investors.

Liquid Transparent Alternatives to Hedge Funds and Private Equity

Using Separately Managed Accounts allows you to attempt to replicate the risk/return profiles of hedge fund and private equity strategies without many of the difficulties associated with investing in traditional funds.

SMA ALTERNATIVES TO HEDGE FUNDS

- Opportunistic Investing
- Wolf Markets
- Tactical Portfolio Manipulation
- Cyclical Inefficiency Risk Premium

SMA ALTERNATIVES TO PRIVATE EQUITY

- Selective/Concentrated Investing
- Eagle Markets
- Focused Position Management
- Secular Inefficiency Risk Premium



Partner with 4Thought Today and Transform The Way You Manage Your Clients' Assets

Through the use of our Separately Managed Account program you can take advantage not only of our flexible Multi-Method Investing® approach and algorithmic investment processes, but also our personnel, training, resources, and support. In the end, our goal is to provide options that help you work in a more holistic way so achieving your client's financial goals becomes easier.

- ✓ Low cost access to high impact investing through our redefined concept of the market cycle
- ✓ Human creativity and support services combined with the power of our technology-driven methodology
- ✓ A flexible program for either a turnkey approach or the manager-of-managers
- ✓ Options for ancillary practice management resources

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*The GIPS firm definition excludes any third party asset management programs over which 4Thought maintains oversight advisory agreements on behalf of its clients, any arrangements under which 4Thought provides recommendations for client self-implementation, and any assets under advisory but not under direct management (in which 4Thought provides allocation changes or trading signals to third party firms but does not take discretion over the trading of client accounts). DATE OF FIRST USE: 10/26/23