ZACKS CUSTOM MODEL SOLUTIONS

Tailored Strategies for Today’s High-net-worth Investor

Built for Flexibility, Designed for Impact

Zacks Investment Management’s Custom Model Solutions empower advisors to deliver personalized investment strategies that reflect the unique needs of high-net-worth clients. Through Zacks’ proprietary platform, you gain access to a fully customizable model portfolio solution offering equity-only or allocation-based models, available with ETFs, single-stock sleeves, or a blend of both.

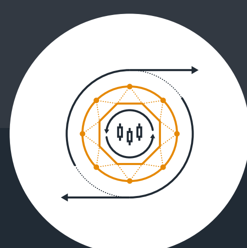
Key Features:

- **Customizable Portfolios**
- **Flexible Structure**
- **Thematic Sleeves**
- **No management or platform fees (Outside of Underlying ETF Expense Ratios)**

What makes up Zacks+ Custom Portfolio Solution?

ETF + SMA Allocation

Your client receives a personalized combination of Zacks proprietary ETFs and SMA sleeves (“tilts”) designed to reflect distinct investment themes, goals, or risk profiles.



SMA Flexibility

Adjust in and out of various sleeves as market conditions change or client preferences evolve—without having to rebuild the portfolio from scratch.

Custom ETF Models

Developed in collaboration with Zacks' portfolio management team, these equity-only models provide a simplified approach to personalized investing.

Growth Model

Focused on capital appreciation through exposure to companies with strong earnings growth and long-term momentum.

Core Model

A diversified strategy that blends growth and value characteristics, forming a solid foundation for an equity portfolio.

Value Model

Targets companies with attractive valuations and stable fundamentals, ideal for investors seeking downside protection and dividend income.

Each model can be adapted to your client's preferences and implemented with a minimum of $250,000.

Why Choose Zacks Custom Models?

Built Around Your Practice

Portfolios are branded to your firm and reviewed quarterly to ensure alignment with client goals and market dynamics.

Collaboration with Portfolio Managers

Work directly with the Zacks Investment Management team to build, refine, and manage your custom strategies.

Fully Customizable

Select from ETF-only, equity-only, or blended portfolio formats. Mix stock sleeves with ETFs to create powerful "core and tilt" structures.

Comprehensive Support

Access proposal tools, performance reporting, and ongoing advisor resources to simplify portfolio management and client engagement.

Who Is It For?

- **High-Net-Worth Clients**
  Looking for tailored investment solutions with a more hands-on approach.
- **Advisors**
  Seeking a flexible, scalable, and cost-effective way to differentiate their offering in a competitive marketplace.

Disclosure

Past performance is no guarantee of future results. Inherent in any investment is the potential for loss. Zacks Investment Management, Inc. is a wholly-owned subsidiary of Zacks Investment Research. Zacks Investment Management is an independent Registered Investment Advisory firm and acts as an investment manager for individuals and institutions. Zacks Investment Research is a provider of earnings data and other financial data to institutions and to individuals.

This material is being provided for informational purposes only and nothing herein constitutes investment, legal, accounting or tax advice, or a recommendation to buy, sell or hold a security. Do not act or rely upon the information and advice given in this publication without seeking the services of competent and professional legal, tax, or accounting counsel. Publication and distribution of this article is not intended to create, and the information contained herein does not constitute, an attorney-client relationship. No recommendation or advice is being given as to whether any investment or strategy is suitable for a particular investor. It should not be assumed that any investments in securities, companies, sectors or markets identified and described were or will be profitable. All information is current as of the date of herein and is subject to change without notice. Any views or opinions expressed may not reflect those of the firm as a whole.

Any projections, targets, or estimates in this report are forward looking statements and are based on the firm's research, analysis, and assumptions. Due to rapidly changing market conditions and the complexity of investment decisions, supplemental information and other sources may be required to make informed investment decisions based on your individual investment objectives and suitability specifications. All expressions of opinions are subject to change without notice. Clients should seek financial advice regarding the appropriateness of investing in any security or investment strategy discussed in this presentation.

Certain economic and market information contained herein has been obtained from published sources prepared by other parties. Zacks Investment Management does not assume any responsibility for the accuracy or completeness of such information. Further, no third party has assumed responsibility for independently verifying the information contained herein and accordingly no such persons make any representations with respect to the accuracy, completeness or reasonableness of the information provided herein. Unless otherwise indicated, market analysis and conclusions are based upon opinions or assumptions that Zacks Investment Management considers to be reasonable. Any investment inherently involves a high degree of risk, beyond any specific risks discussed herein.

Zacks
INVESTMENT MANAGEMENT

Zacks Investment Management
101 N Wacker Drive, Suite 1500, Chicago, IL 60606
Tel. (888) 775-8351 | wholesalesupport@zacksim.com | www.zacksim.com