

Take control of your financial future



Mesirow SMART Portfolios[®]

Mesirow SMART Portfolios is a low-cost, easy-to-use, online portfolio management tool that can help you:

- Manage rollover assets
- Plan for upcoming expenses
- Save for something special
- Prepare for the unexpected
- Keep financial goals on track
- Build long-term wealth

Experience the difference

Powered by state-of-the-art technology and uniquely strengthened by the active oversight of a dedicated investment committee, SMART Portfolios delivers personalized portfolio management that is:

Low Cost | Use of cost-efficient Exchange Traded Funds (ETFs) allows for low fees and no commissions

Easy to Use | Sophisticated technology gives you access to your portfolio any time, from any device

Tax Efficient | Benefit from the use of ETFs and tax-loss harvesting* strategies

Time Efficient | Automated rebalancing saves you time and keeps you on track to meet your goals

Suited to Your Needs | Portfolios tailored to your unique situation



Get started today

Visit us at [mesirow.com/retirementadvisoryservices](https://www.mesirow.com/retirementadvisoryservices)

Make smart decisions
that align with your
specific objectives.

* Tax-loss harvesting is an optional service for portfolios over \$50,000. Mesirow does not provide legal or tax advice.

SMART Portfolios program details and fees are available at www.mesirowfinancial.com/markets/corporations/rpa/rpa-smart-portfolios.

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