

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.

Advisory services offered by Mesirow Financial Investment Management, Inc., an SEC-Registered Investment Advisor. Securities offered through Mesirow Financial, Inc., member FINRA and SIPC. Advisory Fees are described in Mesirow Financial Investment Management Inc.'s Part 2A of the Form ADV. Mesirow refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow name and logo are registered service marks of Mesirow Financial Holdings, Inc., © 2022, Mesirow Financial Holdings, Inc. All rights reserved. Mesirow SMART Portfolios is a registered trademark of Mesirow Financial Holdings, Inc.