

Broadleaf Strategic Investment Portfolios

The Broadleaf Strategic Investment Portfolios (STRIPS) are a group of three actively managed investment portfolios created for investors of varying risk tolerances and investment objectives. All client portfolios are separately managed and follow one of the three actively managed investment models.

Conservative Seeks to protect principal while generating modest income. Can invest up to 35% in equities while maintaining at least a 65% exposure to fixed income investments and cash equivalents.

Balanced Seeks capital appreciation with some downside protection. Will invest 30-80% in equities with the balance in fixed income investments and cash equivalents. In addition to domestic and international equities, may invest in alternative investments where appropriate.

Growth Seeks long-term capital appreciation. Will invest 70-100% in equities with the balance in fixed income investments and cash equivalents. In addition to domestic and international equities, may invest in alternative investments where appropriate.