MAIN
MANAGEMENT, LLC

Custom Model Partnership

Your Model Partner

Custom models are powerful tools for scaling an advisory business. But unlocking their full potential requires the right partner – *one who understands your clients, your process, and your goals.*

<u>Asset Allocation is in our DNA</u>
For over 20 years, we've led the way in diversified, top-down portfolio construction — now built to be customizable for each advisor and their clients.

<u>Client-First, Exceptional Service</u>
Advisors benefit from our comprehensive due diligence on other asset managers, insightful market commentary, and strategic asset class views.

We strive not only to be asset allocators, but a <u>partner</u> to help you deliver the best possible service and end goals to your clients.

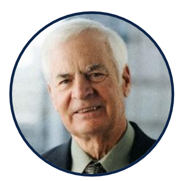
Institutional Process
Boutique Access

INVESTMENT COMMITTEE LEADERSHIP

<u>Kim Arthur</u>
CEO/CIO

<u>Dick Fredericks</u>
Founding Partner

<u>Alex Varner</u>
Director of Research



<u>Jim Concidine</u>
Founding Partner

<u>Darol Ryan</u>
Managing Partner

RESEARCH DRIVEN PORTFOLIOS

<u>James Maxwell</u>
VP of Research

<u>Alex Dippery</u>
Research Analyst

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BENEFITS OF CUSTOM MODELS

Enhanced Efficiency

Model portfolios cut the complexity of managing dozens of unique portfolios. Advisors can simplify asset allocation to a set of custom models that match clients' risk profiles.

Increased Scalability

Once a client's goals are set, the right models roll out across your book—saving time and enabling growth without extra workload.

Focus on Client Relationships

With investment management handled, you can dedicate more time to building and deepening client relationships, which are increasingly important in an age of AI and automation.

The Power of Customization

Our custom models align with each advisor's and client's goals, values, and priorities, ensuring the right fit for your practice.

THE PARTNERSHIP PROCESS

Learn

We start by fully understanding your business and clients. Sales and Research align on preferred managers, asset classes, and performance goals to match your vision.

Build

Through an iterative partnership, we co-create custom model portfolios reflecting your preferences and objectives, refining them until they fit your practice.

Implement

You implement our recommendations as you see fit – without any fees or allocation minimums – as we believe the best model set is the one you're comfortable with.

Partner

Beyond model building, Main partners with you through reviews, market commentary, and practice-management support to drive ongoing success.