Raymond James Multiple Discipline Account
Investment Management

RAYMOND JAMES®
ASSET MANAGEMENT SERVICES

Investment Strategy Selection(s)

Client should understand that the Strategies and allocation percentages are current as of the time this MDA Agreement was entered into and are subject to change at any time without advance notice.

ClearBridge Investments, LLC (Equity Strategies) **(Minimum Investment $300,000)**

Investment Strategy & Allocation Ranges		*Discretion*
CMDUSG - Dynamic MDA - U.S. Growth Portfolio	*Allocation Percentage*	
- ClearBridge Mid-cap Growth	*20% - 55%*	AMS
- ClearBridge Small-cap Growth	*20% - 55%*	
- ClearBridge Large-cap Growth	*20% - 55%*	
CMDGG - Dynamic MDA - Global Growth Portfolio	*Allocation Percentage*	
- ClearBridge Mid-cap Growth	*20% - 55%*	AMS
- ClearBridge All-cap Growth	*20% - 55%*	
- ClearBridge International Growth ADR	*20% - 55%*	
CMDGVG - Dynamic MDA - Global Growth and Value Portfolio	*Allocation Percentage*	
- ClearBridge All-cap Growth	*20% - 55%*	AMS
- ClearBridge Dividend Strategy	*20% - 55%*	
- ClearBridge International Growth ADR	*20% - 55%*	

ClearBridge Investments, LLC (Balanced Strategies) **(Minimum Investment $300,000)**

Investment Strategy & Allocation Ranges		*Discretion*
CMDUDB - Dynamic MDA - U.S. Dividend Balanced Portfolio	*Allocation Percentage*	
- ClearBridge Appreciation	*20% - 50%*	AMS
- ClearBridge Dividend Strategy	*20% - 50%*	
- ClearBridge Select ETF Investment Grade Bond	*15% - 55%*	
CMDGDB - Dynamic MDA - Global Dividend Balanced Portfolio	*Allocation Percentage*	
- ClearBridge Global Infrastructure Income	*20% - 55%*	AMS
- ClearBridge Dividend Strategy	*20% - 55%*	
- ClearBridge Select ETF Investment Grade Bond	*20% - 55%*	

ClearBridge Investments, LLC (Environmental, Social and Governance Strategy) **(Minimum Investment $300,000)**

Investment Strategy & Allocation Ranges		*Discretion*
CMDEGE - Dynamic MDA – Global Growth and Value ESG Portfolio	*Allocation Percentage*	
- ClearBridge All-cap Value ESG	*20% - 55%*	AMS
- ClearBridge International Growth ADR ESG	*20% - 55%*	
- ClearBridge Large-cap Growth ESG	*20% - 55%*	

Investment Strategy Selection(s)

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Eagle Asset Management, Inc. (Equity Strategies) **(Minimum Investment $300,000)**

Investment Strategy & Allocation Ranges		*Discretion**
EMDSDE - Strategic Domestic Equity	*Allocation Percentage*	
- Large-cap Growth	*25% - 45%*	AMS
- Equity Income	*25% - 45%*	
- Small-to Mid-cap Strategy	*25% - 35%*	
EMDSGE - Strategic Global Equity	*Allocation Percentage*	
- International ADR	*25% - 45%*	AMS
- Equity Income	*25% - 45%*	
- Small-to Mid-cap Strategy	*25% - 35%*	

Eagle Asset Management, Inc. (Balanced Strategies) **(Minimum Investment $300,000)**

Investment Strategy & Allocation Ranges			*Discretion**
CIBHQT - Core Income Balanced with High Quality Taxable Bonds	($500,000 Minimum)	*Strategy Code: cibhqt*	
- Mid Cap Concentrated Equity		*20% - 30%*	Manager
- Gibbs Equity Income		*20% - 50%*	
- High Quality Taxable Fixed Income		*20% - 60%*	
CIBHQF - Core Income Balanced with High Quality Tax Free Bonds	($500,000 Minimum)	*Strategy Code: cibhqf*	
- Mid Cap Concentrated Equity		*20% - 30%*	Manager
- Gibbs Equity Income		*20% - 50%*	
- High Quality Tax Free Fixed Income		*20% - 60%*	
CGBHQT - Core Growth Balanced with High Quality Taxable Bonds	($500,000 Minimum)	*Strategy Code: cgbhqt*	
- Mid Cap Concentrated Equity		*20% - 30%*	Manager
- Gibbs Core Growth		*20% - 50%*	
- High Quality Taxable Fixed Income		*20% - 60%*	
CGBHQF - Core Growth Balanced with High Quality Tax Free Bonds	($500,000 Minimum)	*Strategy Code: cgbhqf*	
- Mid Cap Concentrated Equity		*20% - 30%*	Manager
- Gibbs Core Growth		*20% - 50%*	
- High Quality Tax Free Fixed Income		*20% - 60%*	
EMDSDB - Strategic Domestic Balanced with Taxable Managed Income Solution (ETF Only)◆		*Allocation Percentage*	
- Large-cap Growth		*25% - 45%*	AMS
- Equity Income		*25% - 45%*	
- Taxable Managed Income Solution (ETF)		*20% - 50%*	
SDBHQT - Strategic Domestic Balanced with High Quality Taxable Bonds†	($500,000 Minimum)	*Allocation Percentage*	
- Large-cap Growth		*25% - 45%*	Manager
- Equity Income		*25% - 45%*	
- High Quality Taxable Fixed Bonds		*20% - 50%*	

Italicized managers are affiliated with Raymond James.

* AMS holds discretionary authority on Model disciplines and the Manager holds discretionary authority on Non-Model disciplines.

◆ Eagle may invest up to 12.5% of portfolio in high yield bond ETFs. Percent allocated is at the discretion of Eagle.

† Accounts that are individually valued less than $500,000 will be invested in ETFs for the fixed income allocation of the model portfolio.

Raymond James Investment Management, Inc. ("RJIM") is a wholly-owned subsidiary of Raymond James Financial, Inc., a publicly owned corporation. Eagle Asset Management, Inc. is a wholly owned subsidiary of RJIM. Entities associated with the Carillon Family of Funds are affiliates of Raymond James.

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Eagle Asset Management, Inc. (Balanced Strategies) **(Minimum Investment $300,000)**

Investment Strategy & Allocation Ranges			*Discretion**
SDBHQF - Strategic Domestic Balanced with High Quality Tax Free Bonds	($500,000 Minimum)	*Allocation Percentage*	
- Large-cap Growth		*25% - 45%*	Manager
- Equity Income		*25% - 45%*	
- High Quality Tax Free Fixed Bonds		*20% - 50%*	
EMDSGB - Strategic Global Balanced with Taxable Managed Income Solution (ETF Only)◆		*Allocation Percentage*	
- International ADR		*25% - 45%*	AMS
- Equity Income		*25% - 45%*	
- Taxable Managed Income Solution (ETF)		*20% - 50%*	
SGBHQT - Strategic Global Balanced with High Quality Taxable Bonds†	($500,000 Minimum)	*Allocation Percentage*	
- International ADR		*25% - 45%*	Manager
- Equity Income		*25% - 45%*	
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