

THE MANAGED ACCOUNT PLATFORM

BUILT FOR WEALTH ADVISORS



MANAGER PROFILES

12th Street Asset Management

Opportunity Managed Account
Small Cap Value

1492 Capital Management

Small Cap Core Alpha Strategy
Small Cap Growth Strategy
Small Cap Value Strategy

3D/L Capital Management

ESG Equity ETF Portfolio
Global 100 ETF Portfolio
Global 20 ETF Portfolio
Global 40 ETF Portfolio
Global 40 Tax-Sensitive ETF Portfolio
Global 60 ETF Portfolio
Global 60 Tax-Sensitive ETF Portfolio
Global 80 ETF Portfolio
Global 80 Tax-Sensitive ETF Portfolio
Global Growth Equity ETF Portfolio
Targeted Fixed Income 2022 ETF Portfolio
Targeted Fixed Income 2023 ETF Portfolio
Targeted Fixed Income 2025 ETF Portfolio

3Edge Asset Management

Conservative Strategy
Total Return Strategy

4Thought Financial Group

Multi-Contingency Unconstrained
Opportunistic Systematic

Adaptive Investments

Tactical Economic

Adelante Capital Management

Property Securities

Advanced Asset Management Advisors

AAMA Dividend Growth

AAMA Fixed Income
AAMA Growth
AAMA International Growth
AAMA Tactical Balanced

Adviser Capital

AIQ Tactical High Income
Dividend Income

Adviser Partners

Tax Managed Direct Index Portfolios*

AGF Investments

Global Select ADR Constrained
Global Sustainable Equity ADR
U.S. Large Cap Growth Equity
U.S. Small-Mid Cap Growth Equity

Alley Investment Management Company

Dividend Portfolio

Alliance Bernstein

Concentrated Growth Portfolio
Large Cap Growth Portfolio
Municipal High Quality Intermediate Duration*
Municipal High Quality Long Duration*
Municipal High Quality Short Duration*
Municipal Impact SMA* Municipal Income SMA*
Municipal Ladders 1-5 Years*
Municipal Ladders 1-10 Years*
Municipal Ladders 1-15 Years*
Strategic Research Balanced (Non-CISH) SMA*
Strategic Research Portfolio
Tax Aware Fixed Income SMA*

Alpha Vee

Green Transportation Index
International Dynamic Quality Yield Index
Risk Managed Enhanced US Equity

Risk Managed Fixed Income Index
Risk Managed SMID Top 5 Sector US Equity Index
Risk Managed Small Cap Top 5 Sector US Equity
Risk Managed Top 5 Sector & Treasury Bonds Index
Risk Managed Top 5 Sector ETF's & Treasury Bonds Index
Risk Managed US Equity & Treasury Bond Index
US Mega Cap

Alta Capital Management

All Cap Quality Growth
Large Cap Quality Growth

Anchor Capital Advisors

All Cap Value
All Cap Value Balanced
Dividend Income Value
Mid Cap Value
Small Cap Value

Andersen Capital Management

Weather Mark

Appleton Partners

Intermediate Municipal Bond*
Municipal Impact SMA*

Applied Finance Group

Valuation 50
Valuation ADR
Valuation Dividend
Valuation SMID

Applied Fundamental Research

AFR Equity

Aptus Capital Advisors

Impact Aggressive
Impact Conservative
Impact Growth
Impact Moderate
Impact Preserve
Impact Series HNW Conservative
Impact Series HNW Growth
Impact Series HNW Moderate

[* = Available via SMA only] | FEB 2024

Argent Capital Management

Dividend Select
Large Cap Growth Strategy
Mid Cap
SMID Cap Strategy

Aristotle Atlantic Partners

Core Equity
Large Cap Growth

Aristotle Capital Boston

Small/Mid Cap Equity

Aristotle Capital Management

International Equity ADR

Aristotle Credit Partners

High Yield Bond Focused ESG*
Short Duration High Yield Bond*

Ark Investment Management

Disruptive Innovation Global
Growth

ARS Investment Partners

Core Equity
Focused All Cap
Focused ETF

Asteria Wealth

Dividend Strategy
Growth Strategy
US Core Equity

Astor Investment Management

Active Income
Dynamic Allocation

Astoria Portfolio Advisors

High Dividend Yield Stock Portfolio
Inflation Sensitive ETF Portfolio

AthenInvest Advisors

Global Tactical ETFs
Market Rotation
Pure Valuation/Profitability

Ativo Capital Management

International ADR Select

AXS Investments

AXS Multi-Strategy Alternatives

Bahl & Gaynor

Income Growth
Large Cap Quality Growth
Small Cap Quality Growth
Small/Mid Cap Income Growth -
smig®

Baillie Gifford

International Alpha ADR

Beacon Capital Management

Vantage 2.0 Aggressive
Vantage 2.0 Balanced
Vantage 2.0 Conservative
Vantage 3.0 Aggressive
Vantage 3.0 Balanced

Beaumont Capital Management

Decathlon Conservative Tactics
Decathlon Growth Tactics
Decathlon Javelin Market
Decathlon Moderate Tactics
Diversified Equity
Growth
Moderate Growth
U.S. Sector Rotation
U.S. Sector Rotation (Monthly)

Belle Haven Investments

3-17 Muni Ladder*
Ladder PLUS*
Muni PLUS*
Taxable Ladder PLUS*
Taxable PLUS*

Berkshire Asset Management

Dividend Growth and Income
Strategy

Bernardi Asset Management

High Income Municipal*
Intermediate Term Taxable*
Tactical Ladder Municipal*

BirdRock Asset Management

Large Cap Value
Small Cap Value

BlackRock

Equity Dividend
Factor Rotation ETF
Global Dividend ADR
International Equity SMA
Large Cap Core SMA
Large Cap Value
Multi-Asset Income MF/ETF Conservative
Model
Multi-Asset Income MF/ETF Conservative
Model-Tax Aware
Multi-Asset Income MF/ETF Growth Model
Multi-Asset Income MF/ETF Growth Model-
Tax Aware
Multi-Asset Income MF/ETF Moderate Model
Multi-Asset Income MF/ETF Moderate Model-
Tax Aware
Target Allocation ESG ETF - 40/60 Target
Allocation ESG ETF - 60/40 Target Allocation
ESG ETF - 80/20 Target Allocation ESG ETF -
All Equity Target Allocation ETF - 0/100
Target Allocation ETF - 10/90
Target Allocation ETF - 100/0
Target Allocation ETF - 20/80
Target Allocation ETF - 30/70
Target Allocation ETF - 40/60
Target Allocation ETF - 50/50
Target Allocation ETF - 60/40
Target Allocation ETF - 70/30
Target Allocation ETF - 80/20
Target Allocation ETF - 90/10
Target Allocation Tax-Aware 10/90 ETF
Target Allocation Tax-Aware 20/80 ETF
Target Allocation Tax-Aware 30/70 ETF
Target Allocation Tax-Aware 40/60 ETF
Target Allocation Tax-Aware 50/50 ETF
Target Allocation Tax-Aware 60/40 ETF
Target Allocation Tax-Aware 70/30 ETF
Target Allocation Tax-Aware 80/20 ETF
Target Allocation Tax-Aware 90/10 ETF
Target Allocation Tax-Aware Fixed Income
ETF

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Blue Current

Global Dividend Growth

Blue Sky Asset Management

Genfolio Dynamic Asset Allocation
Genfolio Dynamic Asset Allocation Plus
Genfolio Dynamic Fixed Income

Brandes Investment Partners

Global Equity SMA
Global Small-Mid Cap Equity SMA
International Equity
U.S. Value Equity

Brentview Investment Management

Dividend Growth

Bristol Gate Capital Partners

US Equity Strategy

Brookmont Capital Management

Core Dividend Strategy
Dividend Growth Strategy
Quality Growth Strategy

Brown Advisory

Large Cap Growth
Large Cap Sustainable Growth

Broxton Capital Advisors

Alpha Portfolio
Smart Yield

Buckhead Capital Management

Diversified Value

Burke Wealth Management

BWM Focused Growth

Calamos Investments

Global Sustainable Equities
International Sustainable Equities

Cambiar Investors

Large Cap Value
SMID Value

Candriam

Global Climate Action Equity ADR
Global Demographics Equity ADR
Global Oncology Equity ADR
International Equity ADR
U.S. Equity
World Equity ADR

Cantor Fitzgerald

Dividend Growth
Equity Dividend Plus*
Large Cap Focused

Capital Innovations

Global Listed Infrastructure Strategy

Capital Research and Management Company

American Funds Conservative
American Funds Conservative Growth and Income F-2
American Funds Conservative Growth and Income F-3
American Funds Conservative Income F-2
American Funds Conservative Income F-3
American Funds Global Growth F-2
American Funds Global Growth F-3
American Funds Growth American Funds Growth and Income F-2
American Funds Growth and Income F-3
American Funds Growth F-2 American Funds Growth F-3 American Funds Moderate Growth American Funds Moderate Growth and Income F-2
American Funds Moderate Growth and Income F-3
American Funds Moderate Growth F-2
American Funds Moderate Growth F-3
American Funds Preservation F-2
American Funds Preservation F-3
American Funds Retirement Income - Conservative F-2
American Funds Retirement Income - Conservative F-3

American Funds Retirement Income - Enhanced F-2
American Funds Retirement Income - Enhanced F-3
American Funds Retirement Income - Moderate F-2
American Funds Retirement Income - Moderate F-3
American Funds Tax-Aware Conservative Growth and Income F-2
American Funds Tax-Aware Conservative Growth and Income F-3
American Funds Tax-Aware Conservative Income F-2
American Funds Tax-Aware Conservative Income F-3
American Funds Tax-Aware Growth and Income F-2
American Funds Tax-Aware Growth and Income F-3
American Funds Tax-Aware Moderate Growth and Income F-2
American Funds Tax-Aware Moderate Growth and Income F-3
American Funds Tax-Aware Moderate Income F-2
American Funds Tax-Aware Moderate Income F-3
American Funds Tax-Exempt Preservation F-2
American Funds Tax-Exempt Preservation F-3
Global Equity
Global Growth
International Equity
International Growth
U.S. Core
U.S. Equity
U.S. Growth
U.S. Income and Growth
World Dividend Growers

Capital Wealth Planning

Enhanced Dividend Income Portfolio

Carrick Lane

Put Writing

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Catherine Avery Investment Management, LLC

Dividend Focus

Causeway Capital ManagementGlobal Value ADR
International Value ADR**Chartwell Investment Partners**Dividend Value
Mid Cap Value
Small Cap Value
Small Mid Cap Value**Chilton Capital Management**High Conviction
REIT**Churchill Management Group**Aggressive
Equity Dividend Income
Equity Growth and Value
ETF Sector Rotation
Moderate
Moderately Aggressive
Premier Wealth Tactical
Premier Wealth Tactical Core**Clark Capital Management Group**Navigator Fixed Income Total Return
Navigator Fixed Income Total Return Strategy (w/Mutual Funds)
Navigator Global Risk Conservative
Navigator Global Risk Managed Growth
Navigator Global Risk Moderate
Navigator Global Tactical
Navigator MultiStrategy 25-75
Navigator MultiStrategy 50-50
Navigator MultiStrategy 75-25**ClearBridge Investments**All Cap Growth
All Cap Value
Appreciation ESGDividend Strategy
International Growth ADR
International Growth ADR ESG
Large Cap Growth
Large Cap Growth ESG
Large Cap Value
Mid Cap
Mid Cap Growth
Multi Cap Growth
Sustainable Leaders**Coho Partners, Ltd.**

Relative Value Equity

Confluence Investment ManagementEmerging Markets ADR
International Opportunities**Congress Asset Management Company**Large Cap Balanced
Large Cap Growth
Large Cap Growth Custom Tax*
Large Cap Growth Dynamic Tax*
Mid Cap Growth
Mid Cap Growth Custom Tax*
Mid Cap Growth Dynamic Tax*
Multi Cap Balanced
Multi Cap Growth
Small Cap Growth
SMID Core Opportunity
SMID Growth**Cookson Peirce Wealth Management**

All Cap Equity

Copeland Capital ManagementAll Cap Dividend Growth
International ADR Dividend Growth
Large Cap Dividend Growth
Mid Cap Dividend Growth**Counterpoint Mutual Funds**

High Yield Trend

Crossmark Global InvestmentsBalanced Core
Global Equity Income
Large Cap Core Growth**Crosspoint Capital Management**

Accelerated Growth

CWC Advisors, LLC

Small Cap

Cypress CapitalGlobal Allocation
Select Dividend
Strategic Income**Dana Investment Advisors**Balanced Strategy
Concentrated Dividend Equity
ESG Balanced Asset Allocation
Large Cap Equity
Small Cap Equity
Social ESG Equity**Davidson Investment Advisors**Equity Income
Intermediate Municipal Fixed Income*
Intermediate Taxable Fixed Income*
Multi-Cap Equity**Dearborn Partners**All Cap
Balanced Income 60/40
Balanced Income 80/20
Concentrated Balanced Income 60/40
Concentrated Balanced Income 80/20
Core Rising Dividend
High & Rising Dividend
Multi-Asset Income
Tax Bridge 2+3*

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Diamond Hill Capital Management

Large Cap Equity
Select

Distillate Capital

U.S. Fundamental Stability & Value
U.S. Small/Mid Cap Quality & Value

Dividend Assets Capital

DAC North American Midstream
Energy

Donoghue Forlines

DF Veridien Climate Action
Dividend
Dividend & Yield
Global Tactical Allocation
Global Tactical Conservative
Global Tactical Equity
Global Tactical Growth
Global Tactical Income
Growth & Income
Income
Momentum
Treasury

Duration Advisors

DA Tactical Fixed Income

Eagle Ridge Investment Management

Global Quality
International Quality
Small Cap Quality

EARNEST Partners

Small Cap Core
SMID Cap Core

Earth Equity Advisors

EEA Green Sage Sustainability
Portfolio

Easterly Asset Management

Snow All Cap Value
Snow Equity Income
Snow Focus Value
Snow Large Cap Value
Snow Small Cap Value

Eaton Vance

Large Cap Value

Edge Asset Management

Small-Mid Cap Dividend Income

Efficient Market Advisors

2-5 Years Aggressive
2-5 Years Conservative
2-5 Years Moderate
6-10 Years Aggressive
6-10 Years Conservative
6-10 Years Moderate
11-19 Years Aggressive
11-19 Years Conservative
11-19 Years Moderate
20 Plus Years Aggressive
20 Plus Years Conservative
20 Plus Years Moderate
Taking Income Aggressive
Taking Income Conservative
Taking Income Moderate

EQM Indexes

Battery Technology & EV Index
Blockchain & DeFi Index
Commodity Equity Dividend
Income Index
Emerging Markets China Lite
Index
Sun Energy Index

Essex

Global Environmental
Opportunities Strategy (GEOS)
Small Cap Growth

ETF Global

Aggressive Global Growth
Balanced Global Growth & Income
Conservative Global Income
Moderate Global Growth

EULAV Asset Management

Value Line High Dividend Portfolio
Value Line Infrastructure Portfolio
Value Line Multi-Cap Global
Portfolio

Eventide Asset Management

Aggressive Growth
Conservative Income
Defensive
Growth
Income & Growth

Exencial Wealth Advisors

Core Equity
Equity Income
International Equity

F/M Investments

Integrated Alpha Large Cap
Focused Strategy

Faithward Capital

Mid Cap Momentum

Federated Hermes

Clover All Cap Value
Engagement Aggressive
Engagement Conservative
Engagement Moderate
Engagement Moderately
Aggressive
Engagement Moderately
Conservative
Engagement Most Aggressive
Engagement Most Conservative
International Strategic Value
Dividend w/MAP
Kaufmann Large Cap Growth
Strategic Value Dividend

Fidelity Institutional

Multi-Asset Business Cycle-(I)
Multi-Asset Business Cycle-(Z)
Sector Equity Business Cycle-(I)
Sector Equity Business Cycle-(Z)

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Fidelity Institutional—continued

Target Allocation 10/90 (Z)
 Target Allocation 100/0 (Z)
 Target Allocation 20/80 (I)
 Target Allocation 20/80 (Z)
 Target Allocation 30/70 (Z)
 Target Allocation 40/60 (I)
 Target Allocation 40/60 (Z)
 Target Allocation 50/50 (Z)
 Target Allocation 60/40 (I)
 Target Allocation 60/40 (Z)
 Target Allocation 70/30 (I)
 Target Allocation 70/30 (Z)
 Target Allocation 85/15 (I)
 Target Allocation 85/15 (Z)
 Target Allocation Blended 10/90 (Z)
 Target Allocation Blended 100/0 (Z)
 Target Allocation Blended 20/80 (I)
 Target Allocation Blended 20/80 (Z)
 Target Allocation Blended 30/70 (Z)
 Target Allocation Blended 40/60 (I)
 Target Allocation Blended 40/60 (Z)
 Target Allocation Blended 50/50 (Z)
 Target Allocation Blended 60/40 (I)
 Target Allocation Blended 60/40 (Z)
 Target Allocation Blended 70/30 (I)
 Target Allocation Blended 70/30 (Z)
 Target Allocation Blended 85/15 (I)
 Target Allocation Blended 85/15 (Z)
 Target Allocation Index-Focused 20/80
 Target Allocation Index-Focused 40/60
 Target Allocation Index-Focused 60/40
 Target Allocation Index-Focused 70/30
 Target Allocation Index-Focused 85/15
 Target Allocation Tax-Aware 10/90 (Z)
 Target Allocation Tax-Aware 100/0 (Z)
 Target Allocation Tax-Aware 20/80 (Z)
 Target Allocation Tax-Aware 30/70 (Z)

Target Allocation Tax-Aware 40/60 (Z)
 Target Allocation Tax-Aware 50/50 (Z)
 Target Allocation Tax-Aware 60/40 (Z)
 Target Allocation Tax-Aware 70/30 (Z)
 Target Allocation Tax-Aware 85/15 (Z)

Fiera Capital, Inc.

Small Cap Growth
 SMID Growth

Financial Trust Asset Management

International Value Momentum

First Eagle Separate Account Management

Overseas ADR
 U.S. SMID Cap Opportunity

First National Corporation

Chapoquoit Dynamic Portfolios-Aggressive
 Chapoquoit Dynamic Portfolios-Conservative
 Chapoquoit Dynamic Portfolios-Moderate

Flexible Plan Investments

Multi-Strategy Core Aggressive
 Multi-Strategy Core Balanced
 Multi-Strategy Core Conservative
 Multi-Strategy Core Growth
 Multi-Strategy Core Moderate
 Multi-Strategy Equity Trends
 Multi-Strategy Low Correlation
 Multi-Strategy Low Volatility
 Multi-Strategy Special Equity
 QFC Better World ESG Balanced
 QFC Better World ESG Conservative
 QFC Better World ESG Growth
 QFC Faith-Focused BRI Balanced
 QFC Faith-Focused BRI Growth
 QFC Faith-Focused BRI Moderate

QFC Fusion Aggressive
 QFC Fusion Balanced
 QFC Fusion Conservative
 QFC Fusion Growth
 QFC Fusion Moderate

Focus Point Capital

FPC Macro

Franklin Advisers, Inc.

Conservative Growth
 Equity Growth Model
 Growth & Enhanced Income
 Growth & Income
 Growth Model
 Income
 Moderate Growth
 Rising Rate Defense
 Stability
 Tax-Advantaged Growth & Income
 Tax-Advantaged Income
 Tax-Advantaged Stability

Frontier Asset Management

Balanced
 Balanced ETF
 Capital Preservation
 Capital Preservation ETF
 Conservative
 Conservative ETF
 Conservative Income
 Global Opportunities
 Global Opportunities ETF
 Long-Term Growth
 Long-Term Growth ETF
 Moderate Growth
 Moderate Growth ETF
 Tax-Managed Balanced
 Tax-Managed Capital Preservation
 Tax-Managed Conservative
 Tax-Managed Conservative Income
 Tax-Managed Global Opportunities Strategy
 Tax-Managed Long-Term Growth Strategy
 Tax-Managed Moderate Growth

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FTSE Russell

1000 Dividend Select Equal Weight Index
 2000 Dividend Select Equal Weight Index
 Midcap Dividend Select Equal Weight Index
 Top 200 Equal Weight Index
 Top 200 Growth Index
 Top 200 Index
 Top 200 Value Index
 Top 50 Mega Cap Index

Gems Management Limited

Olympia Diversified
 Olympia Fixed Income
 Olympia Healthcare
 Olympia Real Estate
 Olympia Tech

Gener Capital Management

Dividend Income Equity

Global X Management Company

Core Aggressive ETF
 Core Conservative ETF
 Core Moderate ETF
 Core Moderately Aggressive ETF
 Core Moderately Conservative ETF
 Equity Income ETF
 Thematic Disruptors ETF

Globalt Investments

Equity Income Strategy
 innovatETF Strategies–Balanced
 innovatETF Strategies–Conservative
 innovatETF Strategies–Growth
 innovatETF Strategies–High Growth
 innovatETF Strategies–Income Growth

Glovista Investments

Emerging Market Equities
 Global Tactical Asset Allocation

Goldman Sachs Asset Management

20/80 ETF Model Portfolio
 30/70 ETF Model Portfolio
 40/60 ETF Model Portfolio
 50/50 ETF Model Portfolio
 60/40 ETF Model Portfolio
 70/30 ETF Model Portfolio
 80/20 ETF Model Portfolio
 90/10 ETF Model Portfolio

Great Lakes Advisors

Disciplined Equity Climate Opportunities
 Fundamental Equity International Value ADR
 Fundamental Equity Small Cap Value
 Large Cap Core
 Large Cap Value

Guardian Capital LP

Fundamental Global Equity
 Global Dividend Balanced

GW&K Investment Management

2-8 Year Active Municipal Bond*
 Equity Dividend Plus
 Intermediate Municipal Bond*

Gyroscope Capital Management

Large Cap Low Volatility Strategy
 SMID Cap Low Volatility

Hanseatic Management Services

All Cap Growth Equity
 Large Cap Equity

Hazelview Securities

Core U.S. Real Estate

Henry James International Management

Emerging Markets Large Cap
 Global Equity Large Cap
 Global Select
 International Equity Large Cap
 International Select

HGK Asset Management

Large Cap Value Equity
 Mid-Cap Value
 Small Cap Value

Hillman Capital Management

Advantage Value Equity
 Focused Advantage Value Equity

Hilton Capital Management

Dividend & Yield
 Efficient Tactical Income
 Small and Midcap Opportunity
 Tactical Income

Horizon Investment Services, LLC

Investment Dividend Plus

Hotchkis & Wiley

Global Value
 International Value ADR
 Large Cap Fundamental Value

Howard Capital Management

HCM ALP Aggressive
 HCM ALP Balanced
 HCM ALP Conservative
 HCM ALP Growth
 HCM Horizon Income

IDX Insights, LLC

Crypto Opportunity Index
 Gold Real Yield Index
 Managed Duration Index
 Risk-Managed Ethereum Index
 Risk-weighted International Factor ETF Index
 Risk-Weighted Large-Cap Index
 Risk-weighted MidCap ETF Index
 Risk-weighted Smallcap ETF Index
 Strategic Commodity Beta Index
 Tactical Alternative Income Index
 Tactical Corporate Fixed Income Index
 Tactical Equity Factor Index

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IDX Insights, LLC—continued

Tactical Fixed Income Index
 Tactical Gold Index
 Tactical High Yield Index
 Tactical International Equity Factor ETF Index
 Tactical Muni Index
 Tactical Risk-On Index
 Tactical Sector Equity Index
 Tactical Smallcap ETF Index

Indxx

500 Index
 US Cannabis Industry Index
 US Cybersecurity Index
 US eGaming & Virtual Reality Index
 US HYLX Preferred Stock Index
 US Junior Cloud Computing Index
 US Junior Cybersecurity Index
 US Junior Robotics & AI Index
 US Preferred Stock Index
 US Quality Gold Miners Index
 US Sharing Economy Index
 US Tourism & Leisure Index
 US Vegan Index
 USA Cloud Computing Index
 USA E-Commerce Index
 USA Regional Banking Index
 USD Disruptive Technologies Index

Innealta Capital

Country Rotation
 Sector Rotation

Inspire Investing

Core/Satellite Opportunities
 Core/Satellite Opportunities 70/30
 Global Equity
 Global Impact Aggressive
 Global Impact Conservative
 Global Moderate

Integrated Capital Management

iCM Balanced ETF
 iCM Capital Preservation ETF
 iCM Conservative Growth ETF
 iCM Dynamic Growth ETF

iCM Income & Growth ETF
 iCM Tactical Income Closed End (TICE)

Invesco Advisers

BulletShares Corporate 0-10 Years
 BulletShares Corporate 0-3 Years
 BulletShares Corporate 0-5 Years
 BulletShares Corporate 0-7 Years
 BulletShares Municipal 0-10 Years
 BulletShares Municipal 0-3 Years
 BulletShares Municipal 0-5 Years
 BulletShares Municipal 0-7 Years
 Diversification Blend
 Dynamic Active/Passive 100/0
 Dynamic Active/Passive 20/80
 Dynamic Active/Passive 40/60
 Dynamic Active/Passive 60/40
 Dynamic Active/Passive 80/20
 Dynamic ETF 0/100
 Dynamic ETF 10/90
 Dynamic ETF 100/0
 Dynamic ETF 20/80
 Dynamic ETF 30/70
 Dynamic ETF 40/60
 Dynamic ETF 50/50
 Dynamic ETF 60/40
 Dynamic ETF 70/30
 Dynamic ETF 80/20
 Dynamic ETF 90/10
 Dynamic U.S. Factor Rotation
 EQV International Equity ADR
 International Diversification Equity
 OFI International Growth ADR
 SMA
 Strategic Active/Passive Tax Aware 0/100
 Strategic Active/Passive Tax Aware 20/80
 Strategic Active/Passive Tax Aware 40/60
 Strategic Active/Passive Tax Aware 60/40
 Strategic Active/Passive Tax Aware 80/20
 Strategic ETF Tax Aware 0/100
 Strategic ETF Tax Aware 10/90
 Strategic ETF Tax Aware 20/80
 Strategic ETF Tax Aware 30/70
 Strategic ETF Tax Aware 40/60
 Strategic ETF Tax Aware 50/50

Strategic ETF Tax Aware 60/40
 Strategic ETF Tax Aware 70/30
 Strategic ETF Tax Aware 80/20
 U.S. Real Estate Securities

Investment Management of Virginia

Select Equity Income Portfolio
 Small Capitalization Portfolio

Ironwood Investment Management

Small Cap Core
 Value Investment Partners Small Cap Value

iSectors, LLC

Capital Preservation Allocation
 Domestic Equity Allocation
 Global Conservative Allocation
 Global Fixed Income Allocation
 Inflation Protection Allocation
 Post-MPT Growth Allocation
 Post-MPT Moderate Allocation
 Tactical Global Balanced Allocation

Ithaka Group

Concentrated Growth
 EAFE Strategy

J.P. Morgan Asset Management

International ADR
 Large Cap Growth
 Large Cap Leaders
 U.S. Value

JAG Capital Management

Corporate Fixed Income*
 Enhanced Core Fixed Income*
 Large Cap Growth
 Large Cap Growth*

Janus Henderson

Concentrated All Cap Growth
 Global Adaptive Capital Allocation
 Global Adaptive Capital Appreciation

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Janus Henderson—continued

Global Adaptive Capital Growth
 Global Multi-Asset Conservative
 Global Multi-Asset Growth
 Global Multi-Asset Moderate
 Global Sustainable Equity
 Responsible International Dividend ADR
 Sustainable Multi-Asset Conservative
 Sustainable Multi-Asset Growth
 Sustainable Multi-Asset Moderate
 Sustainable Multi-Asset Moderate Conservative
 Sustainable Multi-Asset Moderate Growth
 US Concentrated Growth
 US Growth & Income
 US Mid Cap Growth
 US Mid Cap Value
 US Opportunistic Alpha

Jensen Investment Management

Quality Growth Strategy
 Quality Value Strategy

John Hancock Investment Management

Fundamental Large Cap Core

Julex Capital Management

Dynamic Income
 Dynamic Multi Asset
 Dynamic Sector

Kayne Anderson Rudnick Investment Management

KAR Large Cap Quality Value
 KAR Mid Cap Core
 KAR Small-Mid Cap Core
 KAR Small-Mid Cap Quality Value

Keeley Teton Advisors

Mid Cap Dividend Value
 Small Cap Select Value Equity

Kensington Asset Management

Active Advantage
 Defender
 Dynamic Growth
 Managed Income

Kingsview Investment Management

Ambassador Income
 Blue Chips Elite
 Dividend Plus
 Multi-Strategy Aggressive
 Multi-Strategy Balanced
 Multi-Strategy Conservative
 Multi-Strategy Moderate Aggressive
 Multi-Strategy Moderate Conservative
 ProCap
 Sector Alpha

KKM Financial

Aggressive
 Conservative
 Essential 40
 Growth
 iShares Sector Rotation
 iShares Tactical Rotation
 Moderate

Knowledge Leaders Capital

Global Allocation Strategy
 Global Equity Strategy

Krane Funds Advisors

China Growth
 China Innovation Strategy
 Emerging Markets Dynamic
 Opportunistic China Growth Strategy

Laurus Investment Counsel

US Small Cap

Lazard Asset Management

Emerging Markets Core Equity
 Select ADR

Emerging Markets Equity Select ADR
 Global Equity Select ADR International
 Equity Select ADR International Equity
 Select with Emerging Markets ADR
 International Quality Growth ADR US
 Equity Concentrated
 US Equity Select

Lear Investment Management

Global Vigilance
 Strategic Income

Leeward Investments

Mid Cap Value

Liberty One Investment Management

Capstone
 Opportunity
 Spectrum
 Tactical Growth Solution
 Tactical Income Solution

LMCG Investments

Core Bond ETF
 Diversified Equity
 Equity Income
 Global MultiCap
 Global MultiCap ETF

Logan Capital Management, Inc.

Concentrated Value
 Core 60/40
 Dividend ADR
 Dividend Performers
 Growth
 Large Cap Growth

Logix Investments LLC

Global Equity ETF
 NDR Smart Sector Fixed Income Strategy
 NDR Smart Sector with Catastrophic Stop
 Smart Value Dividend
 Tactical Allocation

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Loomis Sayles & Company

Core Fixed Income with Securitized Asset Fund Managed Account*
 Intermediate Duration Fixed Income Managed Account*
 Large Cap Growth

Lord, Abbett & Co.

Intermediate Municipal SMA*

Lyons Wealth Management

Small Cap Value
 Tactical Allocation

Lyrical Asset Management

LAM U.S. Value Equity - CS

Madison Investments

Dividend Income
 High Quality Intermediate Government/Corporate Bond*
 Intermediate Government/Corporate Bond*
 International Equity ADR
 Large Cap
 Mid Cap Equity
 Mosaic ETF Aggressive
 Mosaic ETF Conservative
 Mosaic ETF Growth
 Mosaic ETF Moderate
 Mosaic ETF Moderate Growth
 Reinhart Active Intermediate Fixed Income*
 Reinhart Catholic Values Intermediate Fixed Income*

Main Management

Active Sector Rotation

Martin Currie

Emerging Markets

Martin Investment Management

Global Eco-Investing
 Global Investing
 International Investing
 U.S. Investing
 Women's Advantage

Maryland Capital Management

MCM Concentrated Growth Equity
 MCM Dividend Growth Equity
 MCM Small Cap Growth Equity

Matrix Asset Advisors, Inc.

Dividend Income
 Large Cap Value

MayTech Global Investments

Global Growth

McElhenny Sheffield Capital Management

Sector Rotation
 Trend Plus

Measured Risk Portfolios

Core*
 Measured Risk Portfolio*

M.D. Sass

Concentrated Value

MFS Investment Management

Equity Income
 Large Cap Growth
 Large Cap Value
 Mid Cap Growth
 Research Core
 Research International ADR

Miller/Howard Investments

Income Equity
 Income Equity (no MLPs)
 Infrastructure
 MLP
 North American Energy (no K-1's)
 Small Cap Dividend

Milwaukee Institutional Asset Management

MIAM Concentrated Equity Value SMA Strategy*
 MIAM Concentrated Equity Value Strategy
 MIAM Focused Fixed Income Value SMA Strategy*

Model Capital Management, LLC

American Revival - Balanced
 American Revival - Growth-Plus
 Tactical 2xGrowth Limit-Loss
 Tactical Growth Limit-Loss
 Tactical Income

Montag & Caldwell

Mid Cap Growth

Morgan Dempsey Capital Management

Large Cap Value

Morningstar Index

US Sustainability Leaders
 Wide Moat Index

MRM Group

All Domestic Equity
 Dynamic International
 Dynamic Overlay
 Global
 Tax-Advantaged Income

MSCI

USA Diversified Multiple-Factor Index
 USA Enhanced Value Index
 USA Minimum Volatility Index
 USA Momentum Index
 USA Quality Index
 USA Socially Responsible Investment Index

Muhlenkamp & Company, Inc.

All Cap Value

NASDAQ Dorsey, Wright, & Associates

Systematic RS Aggressive
 Systematic RS Balanced
 Systematic RS Core
 Systematic RS Global Macro
 Systematic RS Growth

[* = Available via SMA only.] | FEB 2024

NASDAQ Dorsey, Wright, & Associates—continued

Systematic RS International
Systematic RS Tactical Fixed Income

Navigo Wealth Management

CC Alpha

Ned Davis Research

Dynamic Allocation

Neuberger Berman

International ADR Portfolio
Large Cap Value
Sustainable Equity Portfolio
Tax Exempt Limited Maturity*

New Capital by EFG Asset Management

US Small Cap Growth

New York Life Investments

Epoch Global Equity Yield
Pathway Multi-Asset Balanced Income
Pathway Multi-Asset Growth & Income
Pathway Multi-Asset Income

Newfound Research

Structural Alpha Conservative (20/80)
Structural Alpha Conservative Growth (40/60)
Structural Alpha Growth (80/20)
Structural Alpha Moderate Growth (60/40)

NorthCoast Asset Management

CAN SLIM
Sierpinski Tactical Growth

Northern Trust Investments, Inc.

Core Select Bond
DSP Growth w/ Enhanced Income

DSP Growth w/ Income
DSP Growth w/ Mod Income
DSP Income
DSP Income w/ Mod Growth
DSP Maximum Growth
DSP Quality Low Volatility Tax-Sensitive Growth w/ Mod Income
DSP Quality Low Volatility Tax-Sensitive Growth w/Income
DSP Quality Low Volatility Tax-Sensitive Income
DSP Quality Low Volatility Tax-Sensitive Income w/Mod Growth
DSP Quality Low Volatility Tax-Sensitive Max Growth
Quality ESG International (ADR) Model Portfolio
Quality ESG U.S. Model Portfolio
Quality Low Volatility

Nuveen Asset Management

Dividend Growth
ESG Aggressive Growth
ESG All Equity Growth
ESG Conservative Growth
ESG Moderate Conservative Growth
ESG Moderate Growth
Intermediate Term ESG Municipal Bond SMA*
Intermediate Term High-Quality Municipal Bond SMA*
Large Cap Value
Long Term Municipal Bond SMA*
Preferred Securities
Small Cap Value

O'Shaughnessy Asset Management

Market Leaders Value

Oak Associates, Ltd

All Cap Core Growth

Oak Ridge Investments

All Cap Growth
Large Cap Growth

Ocean Park Asset Management

Conservative Allocation Program
Global Balanced 40-60 Portfolio
Global Balanced 50-50 Portfolio
Global Balanced 60-40 Portfolio
HYCB Program
Moderate Allocation
Municipal Bond Program
Strategic Income Strategy
Strategic Income 100
Tactical Bond

Old West Investment Management

All Cap Opportunity

OneAscent Investment Solutions

Core Fixed Income
Peak Equity Builder

Opal Capital

Dividend Income

Optimum Quantvest

S&P 500 Sector Selection

Pacific Income Advisers

Corporate MACS*
Intermediate Core Plus*
Limited Duration MACS*
Market Duration MACS*

Palouse Capital Management

Diversified Income
Large-Cap Value
Large-Cap Value Total Return
Small/Mid Value

Parametric Portfolio Associates

Custom Core US Large Cap (S&P 500)*
TABS Municipal Ladder 1-10 Year*
TABS Municipal Ladder 1-14 Year*
TABS Municipal Ladder 5-15 Year*
US Corporate Ladder 1-5 Year*

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Learn more.

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Pawleys Investment Advisors

Dividend
Growth

Penn Capital Management

Short Duration High Yield*

PIMCO

Tax Aware Fixed Income – Income Focus (Institutional Share)

Tax Aware Fixed Income ETF – Capital Preservation

Tax Aware Fixed Income ETF – Enhanced Core

Taxable Fixed Income – Income Focus (Institutional Share)

Taxable Fixed Income ETF – Capital Preservation

Taxable Fixed Income ETF – Enhanced Core

Pinnacle Associates

SMID Cap Equity

Pinnacle Capital Management

130/30

Piton Investment Management

Tactical Ultra-Short Duration*

Tax-Exempt Intermediate*

Tax-Exempt Ultra-Short Duration*

Taxable Intermediate*

Taxable Managed Yield*

Polen Capital

Focus Growth

Global Growth ADR

International Growth ADR

U.S. Small Company Growth

Potomac Fund Management

Bull Bear

Guardian

Income Plus

Navigrowth

Prime Opportunities Investment Group

Equity Value

Principal Global Investors

Blue Chip Equity

U.S. Real Estate Equity Securities

U.S. Small Cap Select Equity

U.S. Small Cap Select Value Equity

Principal Street Partners

Equity Income

Probabilities Fund Management

Long/Short Equity

Putnam Investments

Aggressive Growth

Balanced Growth

Balanced Income

Conservative Growth

Growth

Income

International Durable Equity ADR

Sustainable Future

Sustainable Leaders

U.S. Large Cap Growth Equity

Concentrated

U.S. Large Cap Value Equity

Concentrated

U.S. Multi-Cap Core Equity

Concentrated

U.S. Small Cap Growth Equity

U.S. Small Cap Value Equity

QSV Equity Investors

Mid Cap

Select

Small Cap

Quartz Partners

AdaptCore Aggressive Growth

AdaptCore Balanced Growth

AdaptCore Conservative Growth

AdaptCore Long-Term Growth

Equity

High Yield Legacy

Spectrum

Yield Plus

Ranger Investment Management

All Cap Focused

Rareview Capital

Dynamic Fixed Income CEF Strategy

Municipal Bond CEF Strategy

Raub Brock Capital Management

Dividend Growth Portfolio

Reaves Asset Management

Listed Infrastructure

Redmond Asset Management

Small Cap Growth

Redwood Investment Management

Engineered Risk Budget:
Drawdown Target 05-08%

Engineered Risk Budget:
Drawdown Target 08-12%

Engineered Risk Budget:
Drawdown Target 12-17%

Engineered Risk Budget:
Drawdown Target 17-25%

Engineered Risk Budget:
Drawdown Target 25-35%

Renaissance Investment Management

Emerging Markets Equity Strategy

International Equity Strategy

International Small Cap Growth

Large Cap Growth

Small Cap Growth

RiskBridge Advisors

MVP Aggressive

MVP Aggressive (Tax-Advantaged)

MVP Conservative

MVP Conservative (Tax-Advantaged)

MVP Moderate

MVP Moderate (Tax-Advantaged)

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River Road Asset Management

Focused Absolute Value
International Equity ADR
Small Cap Value Equity

Riverbridge Partners

All Cap Growth
Eco Leaders

RMB Asset Management

Small Cap Core
SMID Cap Core

Royce Investment Partners

Premier Portfolio

Running Oak Capital

Efficient Growth

Russell Investment Management

Core Balanced
Core Balanced Growth
Core Conservative
Core Equity Growth
Core Growth
Core Moderate
Core Moderate Growth
Hybrid Balanced
Hybrid Balanced Growth
Hybrid Conservative
Hybrid Equity Growth
Hybrid Growth
Hybrid Moderate
Hybrid Moderate Growth International
Large Cap
Personalized Core Equity SMA*
Personalized DI All Cap SMA*
Personalized DI Core Equity SMA*
Personalized DI International SMA*
Personalized DI Large Cap Growth SMA*
Personalized DI Large Cap SMA*
Personalized DI Large Cap Value SMA*
Personalized International SMA*
Personalized Large Cap SMA*
Personalized Small/Mid Cap SMA*
Small/Mid Cap
Tax-Managed Balanced
Tax-Managed Balanced Growth Tax-Managed Conservative
Tax-Managed Equity Growth Tax-Managed Growth
Tax-Managed Moderate
Tax-Managed Moderate Growth

Sage Advisory Solutions

ESG Core Plus
ESG Global Equity
Multi-Asset Income
Tax-Aware Multi Asset Income

Sandhill Investment Management

Concentrated Equity Alpha Wrap

Saratoga Research & Investment Management

Large Cap Quality Focus

Sawgrass Asset Management

Diversified Large Cap Growth
Small Cap Growth Genesis

Scarecrow

Crow Chaser
High 5
Symphonic Index

Schafer Cullen Capital Management

High Dividend Value Equity
Enhanced Equity Income*
International High Dividend ADR
Small Cap Value Equity
SMID Dividend Value Equity Value Equity
Water Impact

Scharf Investments

Scharf Quality Value

Segall, Bryant & Hamill

All Cap Equity
SMID Cap Equity

Seizert Capital Partners

Small Cap Value

Severin Investments

Conservative Growth
Current Equity Income
Long Term Growth
Moderate Growth
Relative Strength Portfolio

Shaker Investments

Long/Short Equity Growth
Small Cap Growth

Sheets Smith Investment Management

Absolute Return Balanced Portfolio

Shelton Capital Management

Equity Income*

SKBA Capital Management

Value Plus

SMArtX Advisory Solutions

OCIO ETF Target Allocation 0/100
OCIO ETF Target Allocation 100/0
OCIO ETF Target Allocation 20/80
OCIO ETF Target Allocation 40/60
OCIO ETF Target Allocation 50/50
OCIO ETF Target Allocation 60/40
OCIO ETF Target Allocation 80/20

Smith Group Asset Management

Small Cap Focused Growth

Sound Shore Management

Large Cap Value

Spears Abacus

Mid Cap Opportunities
Opportunistic Equity

Spectrum Asset Management

Preferred Securities
Preferred Securities Tax
Advantaged
Preferred with Capital Securities

Spouting Rock Asset Management

Small Cap Growth

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Spyglass Capital Management

Growth

SSI Investment ManagementFlexible Allocation - Conservative
Flexible Allocation - Moderate
Flexible Allocation - Moderately Aggressive**ST Capital**

Mid Cap Value

St. James Investment AdvisorsBalanced Portfolio
High Dividend Yield Portfolio**St. James Investment Company**

Select Value

Stance Capital

Equity ESG Large Cap Core

Stansberry Asset Management (SAM)All Weather
Cornerstone
Forever Portfolio
Gold
Income
Mid Cap Value
Total Alpha
Venture Growth**State Street Global Advisors**Income Allocation ETF Model Portfolio
Tactical Allocation Model ETF Portfolios: Conservative
Tactical Allocation Model ETF Portfolios: Growth
Tactical Allocation Model ETF Portfolios: Maximum Growth
Tactical Allocation Model ETF Portfolios: Moderate
Tactical Allocation Model ETF Portfolios: Moderate Conservative
Tactical Allocation Model ETF Portfolios: Moderate Growth**Sterling Capital Management**Equity Income
Focus Equity
Mid Cap Value
Short Term Corporate SMA*
Special Opportunities**Stewart Capital Advisors**All Cap Equity
Large Cap Value
Mid Cap Equity**Strategy Asset Managers, LLC**Market Oriented Core Equity
Worldwide Dividend Plus
Worldwide Equity**Stringer Asset Management**Conservative Growth
Growth
Moderate Growth
Tactical Opportunities**Suncoast Equity Management**Dividend Growth
Small to Mid Cap (SMID) Growth
U.S. Equity Large Cap Select Growth**Sustainable Growth Advisers**Global Growth
International Growth
US Growth**Sustainable Insight Capital Management**US Equity
US Large Cap Value**Syntax**Battery and Energy Storage Index
Bio Revolution Index
Cyber Security Index
Defensive Index
Digital Health Index
Infrastructure Index
Real Asset Ecosystem Index**T. Rowe Price Associates, Inc.**Conservative Income - I Class
Conservative Income - Investor Class
International Core Equity
International Disciplined Equity
Moderate Income - I Class
Moderate Income - Investor Class
Target Allocation 10/90 Active Model
Target Allocation 100 Equity Active Model Portfolio
Target Allocation 100 Fixed Income Active Model
Target Allocation 20/80 Active Model
Target Allocation 40/60 Active Model
Target Allocation 60/40 Active Model
Target Allocation 70/30 Active Model
Target Allocation 80/20 Active Model
U.S. Blue Chip Growth Equity
U.S. Dividend Growth Equity
U.S. Growth Stock
U.S. Large-Cap Core Equity
U.S. Large-Cap Equity Income
U.S. Select Value Equity
U.S. Value Equity**TAMP Advisory Solutions**WealthTrust DBS Conservative Growth & Income
WealthTrust DBS ETF Equity Growth
WealthTrust DBS ETF Equity Value
WealthTrust DBS ETF Quantitative Sectors Portfolio
WealthTrust DBS Long Cap w/ Hedge
WealthTrust DBS Long Term Growth w/ Hedge
WealthTrust DBS Moderate Fixed Income
WealthTrust DBS Quality Mid Cap
WealthTrust DBS Quality Small Cap
WealthTrust DBS Total Return
WealthTrust FINIAT AI Tactical Equity
WealthTrust FINIAT AI Tactical Fixed Income

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TaylorFrigonCapitalManagement

Core Growth
DAC Equity

TCW Investment Management

Concentrated Core

Teton Advisors, Inc.

Small Cap Select Value Equity

The London Company of Virginia

Income Equity
Large Cap Core
SMID Cap

Thomas White International, Ltd

Emerging Markets ADR
International ADR

Thompson Capital Management, LLC

TCM LHA Alpha Seeker
TCM LHA Tactical Beta

Thornburg Investment Management

Emerging Markets ADR
Equity Income Builder ADR
Intermediate Term Muni*
International ADR
International Equity ESG ADR
International Growth ADR
Limited Term Muni*

Todd Asset Management

Global Intrinsic Value Equity
Income
International Intrinsic Value
Large Cap Intrinsic Value

Toews Corporation

Conservative Income
Defensive Alpha Balanced
Defensive Alpha Equity
Hedged Balanced

Hedged Balanced Growth
Hedged Balanced Income
Hedged Capital Preservation
Hedged Equity
Hedged Growth
High Income
Managed Risk Blueprint
Moderate Income

Tom Johnson Investment Management

Balanced Portfolio
Core Relative Value
Diversified Stock Income
Fixed Income
Intermediate Fixed Income
Short Term Investment Portfolio

Torray, LLC

Concentrated Large Growth

TorrayResolute, LLC

Small/Mid Cap Growth

Tran Capital Management

Partners Strategy

Tributary Capital Management

Equity Income Strategy
Small/Mid Cap Equity Strategy

Trillium Asset Management

ESG Core Equity

Uniplan Investment Counsel

Micro Cap
REIT

Van Hulzen Asset Management

Covered Call

Vanguard Group, Inc.

S&P 100/0 ETF Model Portfolio
S&P 20/80 ETF Model Portfolio
S&P 40/60 ETF Model Portfolio
S&P 60/40 ETF Model Portfolio
S&P 80/20 ETF Model Portfolio

VETS Indexes

VETS Employers Index

Victory Capital Management

Integrity Mid-Cap Value
Munder Mid-Cap Core Growth
NewBridge Large Cap Growth

Wakefield Asset Management

Large Cap Equity

Waycross Partners

Core 30 Equity Strategy
Long/Short Equity Strategy

WBI Investments

Bull | Bear Tax-Smart Balanced
Bull | Bear Tax-Smart Dividend
Growth
Bull | Bear Tax-Smart Dividend Income
Bull | Bear Tax-Smart Dividend Retirement
SMA*
Bull | Bear Tax-Smart Retirement Income
Bull | Bear Trend Switch US 1000
Bull | Bear Trend Switch US 2000
Power Factor All Cap High Yield Dividend
Power Factor All Cap Rising Dividends
Power Factor Growth Quality

WCM Investment Management

Focused International Value
Focused U.S. Opportunities
International Core Equity ADR
Mid Cap Quality Value
Quality Global Growth (QGG)
Small Cap Growth
SMID Cap Growth

Weatherstone Capital Management

Asset Enhancement
Income Plus
Strategic Income

Wedgewood Partners

Large Cap Focused Growth

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WestEnd Advisors

Global Balanced
Global Conservative
Global Equity
Multi-Asset
U.S. Sector

Western Asset Management

Core*
Core Plus*

Whitetip Capital

Tactical Income

Wilbanks Smith & Thomas Asset Management, LLC

Credit Select Risk-Managed
Diversified Income Risk-Managed
International Select – Risk Managed
Sector Select-Risk Managed

Winans Investments

Balanced 25-75*
Balanced 50-50*
Balanced 75-25*
Corporate Income*

Winslow Capital

Large Cap Growth

Winthrop Capital Management

Focused Growth Equity
Core Fixed Income*
Corporate Bond 10 Year Ladder*
Corporate Bond 15 Year Ladder*
Corporate Bond 5 Year Ladder*
Large Cap Blend Equity
Municipal Fixed Income*
Ultra-Short Fixed Income*

WisdomTree Asset Management

Disruptive Growth
ESG Aggressive
Fixed Income
Siegel-WisdomTree Global Equity
Siegel-WisdomTree Longevity
U.S. Factor

Zacks Investment Management

All Cap Core
Dividend
Focus Growth
Mid Cap Core
Small Cap Core

ZEGA Financial

Concentrated Stock Management
High Probability Options Strategy - Conservative*

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105 South Narcissus Avenue
Suite 701
West Palm Beach, FL 33401

sales@smartxadvisory.com
561.835.8690

www.smartxadvisory.com