

# Eagle Strategies: Separately Managed Accounts (SMA)

At Eagle Strategies, we've built a platform that leverages the investment capabilities and expertise of more than 40 asset managers.

## SMA Highlights:

- A professionally managed account that carries focused investment strategies.
- Your professional SMA investment manager selects individual securities on a discretionary basis.
- Since you own individual securities, tax treatment of the investments will be unique to your account.
- You may also choose to restrict certain securities to align with your objectives.



The managers are strategists on the Lifetime Wealth Portfolios Platform offered by Eagle Strategies LLC (Eagle). The strategist creates and updates a model portfolio utilizing various mutual funds or exchange-traded funds and delivers the model portfolio to Envestnet Asset Management, Inc. (Envestnet) for implementation. An investor should refer to his/her Investment Management Agreement as well as the Disclosure Brochure for each of the firms noted above for complete information on their respective roles and responsibilities. The strategists, Envestnet, and Eagle are registered with the Securities and Exchange Commission as investment advisors and are not affiliated companies. All investments involve risk including loss of principal.

All securities involve risk including the potential for loss of principal. Fixed income investments are subject to interest rate and credit risk. Investing in an ETF will give the portfolio exposure to the securities comprising the index on which the ETF is based and will expose the portfolio to risks similar to those investing in those securities. ETFs are subject to market price risk. Shares of ETFs are traded on an exchange and will trade at market price, which may be above or below its net asset value (NAV). There is also a liquidity risk in that the trading of an ETF may be halted due to such things as market conditions. The investor will pay brokerage commissions in connection with the purchase of shares of ETFs. Alternative strategies involve magnified risks, are speculative, are not suitable for all clients, and intended for experienced and sophisticated investors who are willing to bear the high economic risks of the investment.