

LIFESTYLESSM

UNBIASED INVESTMENT MANAGEMENT FROM A PIONEER IN OPEN ARCHITECTURE

RELIANCE TRUST IS A PIONEER IN OPEN-ARCHITECTURE, RISK-BASED ASSET ALLOCATION INVESTMENT PORTFOLIOS.

LIFESTYLESSM IS A MUTUAL FUND PROGRAM DESIGNED TO MEET THREE FUNDAMENTAL PRINCIPLES OF PROFESSIONAL MONEY MANAGEMENT: DIVERSIFICATION, ASSET ALLOCATION AND A DISCIPLINED DECISION-MAKING STRUCTURE. RELIANCE TRUST HAS THE SCALE AND EXPERTISE TO SELECT BEST-IN-CLASS MANAGERS AND FUNDS AND TO OFFER UNBIASED, PERSONAL INVESTMENT ADVICE.

STRATEGIC ASSET ALLOCATION TAILORED TO CLIENTS' INVESTMENT GOALS

WE USE A DISCIPLINED ASSET ALLOCATION AND DUE DILIGENCE PROCESS TO CONSTRUCT PORTFOLIOS THAT APPROPRIATELY BALANCE RISKS AND RETURNS WITH THE CLIENT'S SPECIFIC GOALS AND OBJECTIVES.

LIFESTYLESSM PORTFOLIOS

CURRENT INCOME

- **PORTFOLIO:** MONEY MARKET INVESTMENTS; SHORT-TERM BONDS.
- **STRATEGY:** SHORT-TERM GOALS; KEEP INVESTMENTS LIQUID WHILE PROTECTING ASSETS.

INCOME WITH GROWTH

- **PORTFOLIO:** LARGE- & MID-CAP EQUITIES; INTERMEDIATE- & SHORT-TERM BONDS.
- **STRATEGY:** SHORT-TO-INTERMEDIATE GOALS; PROTECT & GROW PORTFOLIO; HEDGE AGAINST INFLATION.

MODERATE GROWTH

- **PORTFOLIO:** LARGE-, MID-, SMALL-CAP & INTERNATIONAL EQUITIES; INTERMEDIATE- & SHORT-TERM BONDS.
- **STRATEGY:** INTERMEDIATE GOALS; CONSERVATIVE GROWTH OVER TIME; MINIMIZE LARGE SWINGS IN VALUE.

WEALTH BUILDING

- **PORTFOLIO:** LARGE-, MID-, SMALL-CAP & INTERNATIONAL EQUITIES; INTERMEDIATE- & SHORT-TERM BONDS.
- **STRATEGY:** INTERMEDIATE- & LONG-TERM GOALS; BUILD WEALTH & PROTECT AGAINST LONG-TERM INFLATION.

AGGRESSIVE APPRECIATION

- **PORTFOLIO:** LARGE-, MID-, SMALL-CAP & INTERNATIONAL EQUITIES.
- **STRATEGY:** LONG-TERM GOALS; ABOVE-AVERAGE GAINS OVER TIME WITH HIGHER LEVEL OF RISK.

RELY ON US FOR LIFESTYLESSM ADVANTAGES.

- ACTIVE, PROFESSIONAL PORTFOLIO MANAGEMENT
- ONE CONSOLIDATED, DIVERSIFIED ACCOUNT BASED ON TAILORED ASSET ALLOCATION
- PORTFOLIO REBALANCING TO ENSURE APPROPRIATE RISK LEVEL
- FOCUS ON TOP MANAGERS & BELOW-AVERAGE EXPENSES, FEES & TURNOVER
- ACCESS FOR INDIVIDUAL INVESTORS TO INSTITUTIONAL-LEVEL MUTUAL FUND PRICING
- MORE THAN 15 YEARS OF PERFORMANCE HISTORY WITH EXCELLENT RESULTS

WWW.RELIANCE-TRUST.COM | 1-800-749-0752

© 2010 RELIANCE TRUST COMPANY. ALL RIGHTS RESERVED.

