

AN OVERVIEW OF

Columbia Asset Allocation Portfolios

AT A GLANCE

🎯 Investor goal

📈 Grow assets

★ Potential benefits

- **Active and passive implementation.**

The portfolios invest in a mix of active and passive exposures, allocating to both mutual funds and ETFs.

- **Global multi-asset diversification.**

Meaningful diversification is achieved via exposure to a variety of global asset classes, including domestic equity, international equity, U.S. investment-grade fixed-income and high-yield.

- **Enhanced risk/return potential.**

Ongoing tactical adjustments to strategic allocations are made in an attempt to improve the risk/return profile over a full market cycle.

What do they do?

These low-cost, professionally managed portfolios provide broad diversification to global equity and fixed-income markets and attempt to grow client assets consistently over time.

What makes them unique?

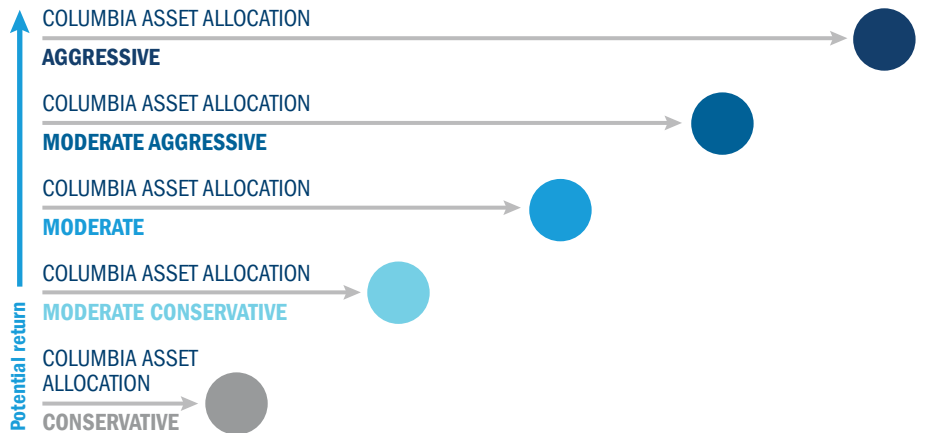
These are strategic, multi-manager portfolios that are actively managed with the goal of optimizing return across a variety of risk profiles.

How do they work?

The portfolios seek attractive returns by thoughtfully calibrating investment exposures through market cycles.

TAILORED TO MEET YOUR CLIENTS' TOLERANCE FOR RISK

Select the portfolio that best aligns with your tolerance for risk.



	CONSERVATIVE	MODERATE CONSERVATIVE	MODERATE	MODERATE AGGRESSIVE	AGGRESSIVE
BENCHMARK	20% MSCI ACWI All Cap Index Net	35% MSCI ACWI All Cap Index Net	50% MSCI ACWI All Cap Index Net	65% MSCI ACWI All Cap Index Net	80% MSCI ACWI All Cap Index Net
	80% Bloomberg Barclays U.S. Aggregate Bond Index	65% Bloomberg Barclays U.S. Aggregate Bond Index	50% Bloomberg Barclays U.S. Aggregate Bond Index	35% Bloomberg Barclays U.S. Aggregate Bond Index	20% Bloomberg Barclays U.S. Aggregate Bond Index

The MSCI All Country World Index (MSCI ACWI Index) is a free float-adjusted market capitalization-weighted index that is designed to measure the equity market performance in the global developed and emerging markets. The Bloomberg Barclays U.S. Aggregate Bond Index is a market value-weighted index that tracks the daily price, coupon, paydowns and total return performance of fixed-rate, publicly placed, dollar-denominated, and nonconvertible investment-grade debt issues with at least \$250 million par amount outstanding and with at least one year to final maturity. It is not possible to invest directly in an index.

There is no guarantee that the investment objective will be achieved or that return expectations will be met.

Backed by experts

Our **Global Asset Allocation team** harnesses deep expertise and firmwide resources to ensure we are creating and implementing strategies to help our clients reach their investment goals.

\$91 billion

in assets under management¹

15

years of investment experience on average

29

asset allocation investment professionals

Complement your expertise with ours

We offer model portfolios across a diverse suite of 24 strategies, helping investors reach their investment goals for more than 14 years.



Proven expertise.

Broad asset allocation capabilities, multi-manager research and strong underlying investment strategies are all informed by our risk-aware philosophy.

Strong partnership.

Simplify your practice and strengthen your client offerings with access to resources that can scale and grow your practice.

A focus on clients.

Every strategy is built with your clients in mind, seeking to align their investment goals with financial outcomes.

To speak to one of our model portfolio specialists, call **800.870.8582**.



¹ Asset allocation team assets shown reflect Columbia Management Investment Advisers, LLC assets as of June 30, 2021.

Investment experience and model information as of June 30, 2021.

Investment risks: The portfolios are subject to the investment performance (positive or negative), risks and expenses of **underlying funds** in which they invest. Securities in which these funds invest involve risks including but not limited to **market risk, price volatility, credit risk, interest rate risk, prepayment and extension risk, political/economic risk, currency risk and liquidity risk**.

These managed account solutions are only available through investment professionals. Not all strategies may be available on all platforms. Managed account programs may require a minimum asset level and may not be suitable for all investors.

International investing involves certain risks and volatility due to potential political, economic or currency instabilities and different financial and accounting standards. **Risks are enhanced for emerging market issuers. Non-investment-grade** securities have greater credit risk and volatility. **Asset allocation and diversification** does not assure a profit or protect against loss. **ETFs** trade like stocks, are subject to investment risk and will fluctuate in market value.

Not Federally Insured | **No Financial Institution Guarantee** | **May Lose Value**

Columbia Threadneedle Investments (Columbia Threadneedle) is the global brand name of the Columbia and Threadneedle group of companies.

Columbia Management Investment Advisers, LLC (CMIA) is an investment adviser registered with the U.S. Securities and Exchange Commission.

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CT-MK/115976 C (07/21) UYU1/3635908