

**WE PARTNER WITH**

- High-net-worth investors
- Family office relationships
- Trusts
- Corporations
- Foundations
- Pension funds

## FIXED INCOME SOLUTIONS

At Columbia Threadneedle Investments, the strength of our Fixed Income Solutions comes from our commitment to providing truly customized portfolios, tailored to each client's unique needs. Each account is managed by a dedicated portfolio manager with extensive investment experience. Their talents and our size allow us to provide clients access to active portfolio management, institutional trading, fundamental credit research and strong technology resources.

We offer a personalized investment experience, partnering closely with each client to help pursue their desired outcomes.

**\$186.6B** TOTAL  
GLOBAL FIXED-INCOME ASSETS  
under management<sup>1</sup>

**149**  
FIXED-INCOME  
professionals<sup>1</sup>

**52** ANALYSTS  
WITH AN AVERAGE  
of **16** years of  
experience<sup>1</sup>

**37** PORTFOLIO  
MANAGERS WITH AN  
average of **25**  
years of experience<sup>1</sup>

**17** TRADERS  
WITH AN AVERAGE  
of **20** years of  
experience<sup>1</sup>

<sup>1</sup> Columbia Management Investment Advisers firm fixed-income assets and professionals as of 6/30/20, updated annually. Contact us for more current information. Total investment professionals includes additional professionals integral to the investment process including multi-asset/alternatives, economists, client portfolio managers, and investment risk professionals, reflecting fixed-income professionals across Columbia Threadneedle Investments.

**INVESTOR GOALS:** Total return — Income — Capital preservation

**Full account customization includes:**

- Investment horizon
- Benchmark identification
- Liquidity/cash flow needs
- Tax sensitivity
- Geography/state preference
- Maturity guidelines
- Credit quality guidelines

## Trading, credit research and technology: Working together for your success

	OUR DIFFERENTIATORS	POTENTIAL BENEFITS TO CLIENTS
TRADING	<ul style="list-style-type: none"> <li>With \$140.7 billion in fixed-income assets, we have significant market presence.</li> <li>Based on our size, depth and the strength of our partnerships with broker/dealer firms, we are designated a Tier 1 firm.</li> <li>Our traders talk with 100+ approved broker/dealers who we put through a vigorous due diligence review process.</li> </ul>	<p><b>Tier 1 trade execution provides:</b></p> <ul style="list-style-type: none"> <li>The ability to affect new issue structures and pricing.</li> <li>Early access to new issue deals.</li> <li>The ability to capitalize on short-term market opportunities and market dislocations.</li> </ul>
CREDIT RESEARCH	<ul style="list-style-type: none"> <li>Our analysts conduct proprietary research on purchases and monitor every credit and structured asset we hold for ongoing sustainability.</li> <li>Credit team members prepare analyses and review new issues prior to market release to give portfolio managers and traders the opportunity to indicate early interest.</li> <li>Our strong research means portfolio managers are comfortable holding select lower rated investment-grade credits, smaller issues and out-of-benchmark credits — increasing our potential to add value.</li> <li>Our structured product analysts stress-test underlying cash flows of all collateral types to ensure tranches held are sound.</li> </ul>	<ul style="list-style-type: none"> <li>Potential yield and total return advantage to be gained from smaller issues, lower credit quality and buying issues beyond general obligation bonds.</li> <li>Potential spread advantage in holding lower rated credits and non-essential service sectors.</li> <li>Principal preservation by avoiding credit downgrades.</li> <li>Structured assets are used to diversify and add high-quality liquid assets to help enhance return and reduce volatility.</li> </ul>
TECHNOLOGY	<ul style="list-style-type: none"> <li>Our size and scale in fixed income have allowed us to make a multimillion-dollar investment in technology.</li> <li>We have access to the top technological resources in the industry (Perform application and BlackRock's Aladdin).</li> </ul>	<ul style="list-style-type: none"> <li>Robust attribution capabilities to determine where performance is being generated.</li> <li>Portfolio managers able to evaluate portfolios for risk exposures across maturity, duration, sector, state and issuer relative to any market index.</li> <li>Easy to identify the effect of yield-curve shifts, which can be viewed on a portfolio or security-specific level.</li> </ul>

### Highlighted strategies

- Columbia Short Term Municipal
- Columbia Short Intermediate Municipal
- Columbia Quality Intermediate Municipal
- Columbia Intermediate Municipal
- Columbia Intermediate Taxable
- Columbia Core Taxable
- Crossover Tax Exempt/Taxable

For more information, please contact your regional consultant at **800.521.1297**



There can be no assurance that an investment objective will be met or that return expectations will be achieved.

There are risks associated with fixed-income investments, including credit risk, interest rate risk, and prepayment and extension risk. In general, bond prices rise when interest rates fall and vice versa. This effect is usually more pronounced for longer term securities.

Advisory services provided by Columbia Management Investment Advisers, LLC.

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.

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

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CT-MK/112251 F (07/20) NOFD/3158321