

NORTHERN TRUST RESEARCH

FOCUS INVESTMENT RESEARCH

Enhance your investment decision-making with comprehensive and timely information

FOCUS INVESTMENT RESEARCH SUBSCRIPTION SERVICE LEVEL OUTLINE

STANDARD SERVICE

- **A Comprehensive Equity Package** including:
 - **Equity Guidance List** covering approximately 280 large cap companies (weekly)
 - **Daily Equity Research Summary** of our daily research call along with updates on key economic releases, research reports, companies reporting earnings, market updates and more
 - **Equity Investors Weekly** including detailed research reports from Northern Trust Senior Equity Analysts, available each Monday
 - **Sector Views** (Monthly)
- **Capital Markets Assumptions Five Year Outlook** (annually)
- **Asset Allocation Models** for both strategic and tactical time horizons including templates and guidelines (monthly)
- **Monthly Financial Market Update Conference Calls** with Northern Trust senior strategists and leadership
- **Client Meeting Support** supporting all research and asset allocation recommendations including a monthly newsletter and supporting chartbooks
- **Portfolio Construction Support** provided by licensed professionals
- **Timely Economic and Market Commentaries** including forecasts and reviews
- **Benchmark Index Returns** (monthly)
- **Fixed Income Commentary** (weekly / monthly)
- **Fixed Income Guidance List** including suggested treasuries, agencies and corporates (weekly)
- **Quarterly Distinguished Speaker Series Calls:** *Beyond Investments—FOCUS on Wealth Management* with Northern Trust subject matter experts
- **Invitation to the Annual FOCUS Conference** at Northern Trust's Chicago headquarters for all registered users
- **InFOCUS Web Portal Access for Up to 10 Registered Users** enabling on demand access to FOCUS Investment Research materials
- **e-Mail Content Delivery** (daily, weekly, monthly and ad hoc communications)

PREMIER SERVICE

- **All Standard Service Components**
- **FOCUS Research Model Equity Portfolio**
A fundamentally driven, high quality model portfolio designed with a goal to provide downside protection along with upside participation
- **Monthly Conference Calls** with Northern Trust Equity Research Analysts highlighting our sector outlook, trends and top picks
- **Access to Northern Trust Equity Research Analysts and Staff** including a dedicated, email-based Premier Hotline (FOCUS-Premier@ntrs.com) providing instant access to our experts for questions and callback requests
- **Asset Allocation Support** direct access to Northern Trust's Senior Investment Strategist and Investment Solutions Group (NorthernSolutionsGroup@ntrs.com)
- **Private Label Market Insights** customized with your logo and contact information to support communication with your client base



- **Executive Peer Winter Roundtable at Northern Trust's Asset Management Offices in West Palm Beach, Florida** with Northern Trust senior executives, active equity portfolio managers, and more
- **InFOCUS Web Portal Access for 10 Additional Registered Users** (20 total – Additional users negotiable)

FOR ADDITIONAL INFORMATION, PLEASE CONTACT:

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