NORTHERN TRUST ASSET MANAGEMENT
INVESTMENT INSTITUTE

The Investment Institute

LET OUR EXPERTS BE YOUR EXPERTS

Scale and streamline your practice with Northern Trust's investment solutions, insights and expertise.

SUPPORT TO BUILD AND GROW YOUR BUSINESS

The Northern Trust Asset Management Investment Institute is designed to equip financial professionals with all the tools and support needed to build and grow a successful investment practice.

RESEARCH AND INSIGHTS

We deliver our best thinking — to you and your clients—to empower consistent, risk-aware investment decision-making and facilitate the achievement of both investment and business goals.

INVESTMENT PORTFOLIO SOLUTIONS

Efficiently expand your investment offering with multi-asset portfolio solutions thoughtfully designed to meet a broad range of client objectives and time horizons.

CONSULTATIVE ADVISORY SERVICES

Advance your growth initiatives with the support of our resources and a diverse team of experienced experts focused on your success.

PUT OUR EXPERTISE TO WORK FOR YOU

We believe that by combining your local market expertise with the global resources of Northern Trust, we can create a powerful synergy to help advance your growth initiatives, enhance client service and satisfy regulatory expectations.

SCALE YOUR PRACTICE

Leverage our resources to free-up time to focus on business development and building client relationships

DEMONSTRATE INVESTMENT CONSISTENCY

Effectively demonstrate a well-defined investment process to both clients and regulators

ENHANCE CLIENT ENGAGEMENT

Use our collateral, insights and expertise to drive more effective client communications

RESEARCH & INSIGHTS

Northern Trust Investment Solutions provide access to our unique views on the global economy and markets, along with insights and practical solutions to guide effective portfolio positioning in a complex and ever-changing investment landscape. In addition, our program includes thought leadership on a variety of topics from behavioral finance to goal-based portfolio construction, to help professional investors navigate evolving industry dynamics. For financial intermediary clients, a selection of wealth management insights is also available for white-labeling, to enhance business development and client engagement.

ASSET ALLOCATION	EQUITY RESEARCH	FIXED INCOME RESEARCH	ECONOMIC RESEARCH	BEYOND INVESTMENTS	KNOWLEDGE CENTERS

INVESTMENT INSTITUTE MEMBER: *Access Northern Trust Investment resources to help scale your business*

• Long-term Capital Market Assumptions
• Asset Allocation Models
• Full Communication Support
	• Equity Guidance List & Company Reports
	• Daily Research Summary
	• Sector Views
		• Guidance List for Multiple Issue Types
		• Weekly Fixed Focus Report
		• Quarterly Updates
			• Weekly Economic Commentary
			• U.S. and Global Economic & Interest Rate Outlook
			• *View from Here* from Chief Economist
				• Access to White Papers and Advice:
				  • *Wealth Planning*
				  • *Regulatory Issues*
				  • *Estate Planning*
				  • *Philanthropy*
				  • *Marketing*
					• ESG Center
					• Retirement Center
					• Factor Center
					  • *Insights*
					  • *Research*
					  • *Tools*
					  • *Client Communications*

INVESTMENT INSTITUTE PREMIER PARTNER: *Partnership with Northern Trust as an extension of your practice**

• Direct Access to Asset Allocation Strategists • Investment Policy Committee Minutes • White label Market Insights	• Direct Access to Equity Analysts • Weekly Model Equity Portfolio • Monthly Equity Market Update Call	• Direct Access to Fixed Income Analysts • Municipal Research Assistance	• Direct Access to Economists • White label Economic Insights (upon request)	• Direct Access to Subject Matter Experts • Educational Curriculum • White label Thought Leadership (upon request)	• *RetireGreater* white label retirement planning platform

**Investment Institute Premier Partner membership includes all Investment Institute Member materials listed above.*

INVESTMENT PORTFOLIO SOLUTIONS

Northern Trust Investment Solutions are grounded in a time-tested global asset allocation discipline and enhanced by extensive risk management, portfolio construction and product fulfillment expertise. These core capabilities enable us to provide globally diversified portfolio solutions that seek to create exceptional risk-managed growth in line with a broad range of investor goals.

Multi-Asset Strategies

Complete portfolio solutions for a range of objectives and time horizons

Designed Portfolio Solutions

Bespoke portfolio solutions designed in line with client preferences to pursue specific goals

Portfolio Consulting

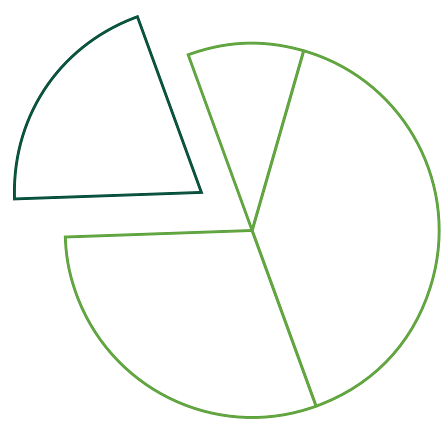
Through rigorous analysis, we seek to identify opportunities for greater efficiency, risk reduction and enhanced outcomes

Our collective expertise supports a global investment offering that includes a full suite of traditional passive, factor-based, fundamental active, multi-manager, alternative, inflation-sensitive, fixed income, cash management and multi-asset class strategies, available in a variety of investment vehicles

PORTFOLIO ANALYSIS, DESIGN AND IMPLEMENTATION GUIDANCE

Investment Institute members can consult with our licensed portfolio construction experts for portfolio analysis and guidance to help create solutions that align with your investment philosophy. The Institute also provides investment professionals with bespoke portfolio design to support custom mandates.

With our thoughtfully designed asset allocation framework as the foundation, we seek to construct globally diversified portfolios that meet expectations throughout market cycles. Our disciplined approach employs both quantitative and qualitative analysis to identify suitable investment strategies and combine them in ways that seek to amplify their strengths while minimizing concentration bias and overall portfolio risk. This process seeks to deliver optimized investment solutions that address complex portfolio challenges and align with investor goals. Furthermore, by using precise combinations of our quantitative factor-based strategies, we seek to provide an enhanced risk/return profile above and beyond more conventional index strategies.



NORTHERN TRUST ASSET MANAGEMENT

INVESTMENT INSTITUTE

CONSULTATIVE ADVISORY SERVICES

Behind our offering is a globally diverse team of investment professionals whose expertise spans global markets, economies investment products, and more. Our holistic support model provides professional investors with a distinctive array of resources and insights to facilitate the achievement of both investment and business objectives.

Our investment solutions experts take the time to get to know your business, challenges and strategic vision, to help you leverage our program resources to your benefit. Utilizing a consultative approach, we take into consideration your priorities—as well as the broader market and economic landscape—to help you implement effective investment solutions, build scale, pursue opportunities and grow your practice.

In addition, the Investment Institute hosts a variety of educational webinars and events including the annual Investment Institute Conference and Executive Peer Winter Roundtable for Premier members.

- ASSET ALLOCATION INSIGHTS
- PORTFOLIO ANALYSIS, DESIGN & IMPLEMENTATION GUIDANCE
- PRODUCT RESEARCH & ANALYSIS
- PROFILES & COMMENTARIES
- PERFORMANCE REPORTING
- INVESTMENT REVIEWS
- PARTNERSHIP IN PURSUING INSTITUTIONAL OPPORTUNITIES
- EDUCATIONAL TOOLS & EVENTS
- MARKETING MATERIALS & MORE

LET OUR EXPERTS BE YOUR EXPERTS

Schedule a tour to learn more about growing your business with the support of the Investment Institute. Contact your **Northern Trust Relationship Manager** or the **Northern Solutions Group** at **NorthernSolutionsGroup@ntrs.com.**