

# Start with what you know.



Not all alternative products are created equal. But when it comes to introducing alternative investments to your clients, start with what clients **already know and own**, and build from there.

The rise of technology has given advisors the ability to customize structured products to match their clients individual risk profiles and investment goals. By constructing structured products that are linked to investments they already know and own, advisors can have **more impactful conversations** with their clients on how alternative products can fit in their portfolio construction. The steps for customizing and starting with what they know are simple:

1. Use a technology platform that gives you the ability to choose an underlier that is well known or owned already by your client - for example, the S&P 500 Index.

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2. Add downside protection to show how the investment can provide a level of principal preservation if the market underperforms.

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3. Add enhanced upside potential to show how the investment can outperform in positive market environments.

3



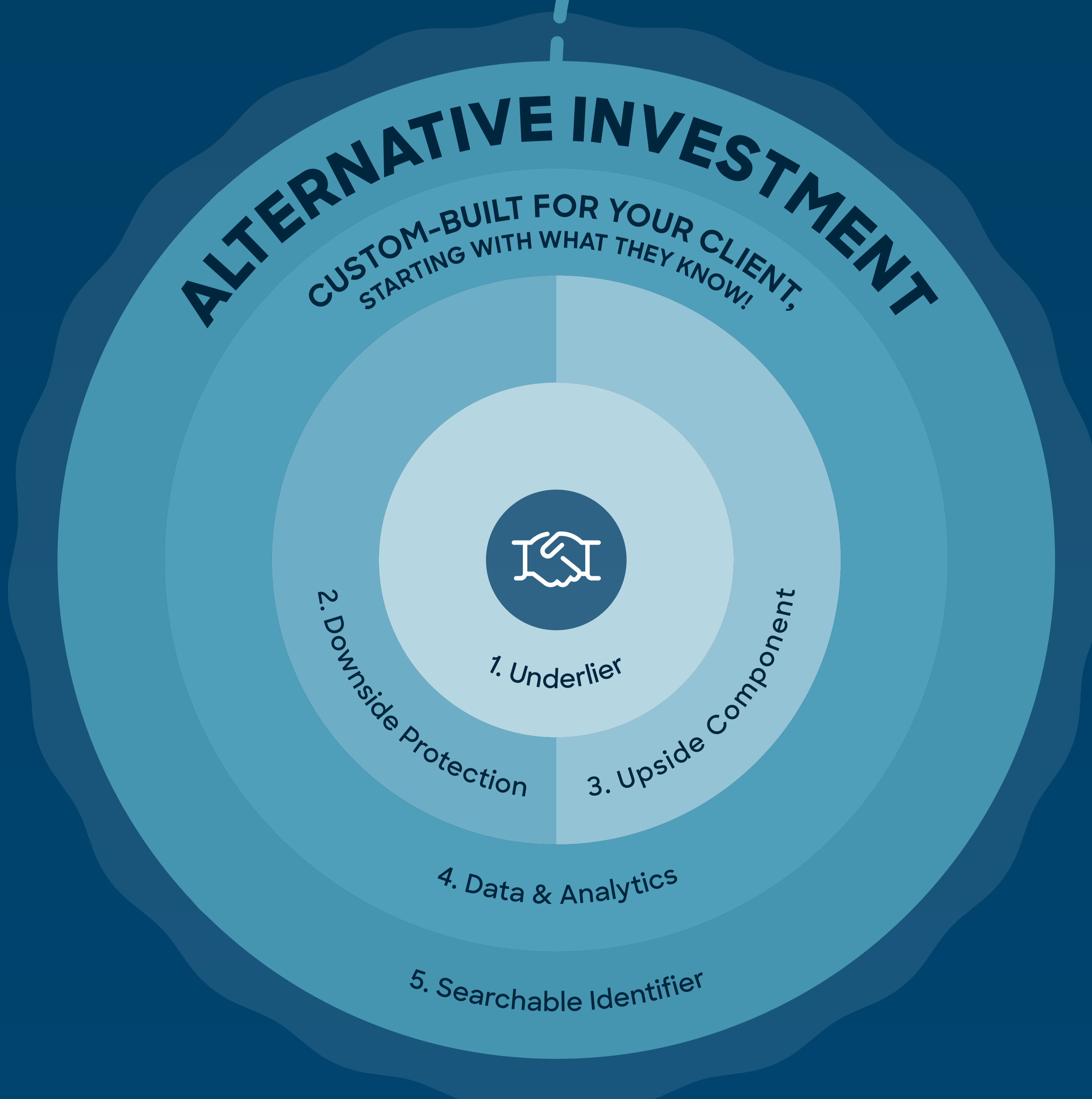
4. Display data and analytics on how the product would impact your client's portfolio and its risk structure (available to Morningstar® Advisor Workstation™ users, powered by Luma.)

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5. Provide your client with the product's Nasdaq identifier so they can track its performance over its entire lifecycle. Identifiers resemble mutual fund symbols providing more than 100 million investors across Nasdaq Fund Network's 400+ market data platforms.

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Technology continues to revolutionize structured products, resulting in **enhanced transparency** and more efficient digital processing for investors. By starting with what your clients already know, you will be on the path to seamlessly introducing your clients to the alternatives space, and ultimately, better portfolio outcomes.

