

Mutual Fund, 529 & Alternative Investments



As a valued business partner, we provide you the freedom to choose the company and investment vehicle that best suits your business style and client's needs. With our open architecture and no proprietary products being required, you will have independent selection of companies and products to meet each client's needs or goals. We add valued partners who have specific expertise on subjects of importance to your client's needs in a vast array of products. Generally, all share classes available from the fund family are part of our selling agreement, depending on the platform compliance restrictions. We provide qualified high-net-worth clients a range of alternative investments from companies our Risk Mitigation team has approved for sale after robust review including input from third party independent due diligence firms and experts.

Alger Funds	Franklin Templeton Investments	Pacific Funds
Alliance Bernstein Investments	Franklin Square Capital Partners	Phillip Edison REIT
Allianz Global Investor (Retail - A/B/C/D/R)	FTC - BDFS	Pioneer Investments
Altegris Investments	Goldman Sachs Funds - Retail	PIMCO Retail Funds
American Century Funds	Griffin Capital Securities	Principal Funds
American Funds and 529 Plan	Guggenheim Investments	Prudential Mutual Funds
American Realty Capital	Hartford Funds	Putnam Investments
AMG Funds	Hartford Smart529 Plan	Resource Securities
Apartment Trust of America	Hartman Investments	Sammons LiveWell IRA
Aquila Group of Funds	Highland Capital Management	Saratoga Advantage Trust/Fidelity
Ascensus College Savings	Hines Securities Inc.	S.C. Distributors
Blackrock Funds & 529 Plans	Inland Securities Corp.	Scholars Choice 529 Plan
BofA Global Capital Mgmt	Invesco	Security Benefit Advisor Mutual Funds
Calamos Funds	InvesTrust Property Corp.	SmartStop Asset Management
Calvert Funds	Iowa Advisor 529 Plan	Steadfast Capital Markets
CION Securities, LLC	Ivy Funds and 529 Plan	SunAmerica Asset Mgmt, LLC
CNL Securities Corp	John Hancock Freedom 529	Texas LoneStar 529 Plan
Cole Capital	John Hancock Investments	The Timothy Plan
College Choice Adv 529	JP Morgan Funds	Thornburg Funds
Columbia Threadneedle Funds	KBS Capital Markets	Transamerica Funds
Davis Funds	Lightstone Capital Markets	Triloma Securities
Delaware Funds	Lord Abbett & Co LLC	US Energy Development Corp
Deutsche Asset & Wealth Mgmt	MainStay Funds	VALIC Group M.F. & 529 Plans
Dodge & Cox Funds	Mewbourne Development Crop	Victory (Munder) Mutual Funds
Dreyfus Family of Funds	MFS Investment Management	Virtus Investment Partners/M.F.
Eaton Vance Funds	Nexpoint Capital	VOYA 529 Plans (Iowa)
Federated Securities Corp.	Northstar Securities, LLC	W.P. Carey & Co, LLC
Fidelity Advisor Funds	Nuveen Investment Mutual Funds	Waddell & Reed/IVY Funds
First Eagle Funds	Oppenheimer Funds	
First Trust Portfolios UITs	Oppenheimer Funds - 529	

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