ADD A NEW DIMENSION TO YOUR PRACTICE.

QUESTAR
ASSET MANAGEMENT

YOUR PRACTICE IS ENTERING A NEW ERA.

One of our core values at Questar Asset Management (QAM) is acting in our clients' best interest, which is why we're uniquely positioned to help you.

Add a new DIMENSION to your practice.

Through our combination of technology, products, education, and financial planning resources, we provide solutions that can grow your business while helping you:

- Deepen your client relationships.
- Develop and document client goals.
- Provide solutions designed to achieve those goals while clearly serving your clients' best interests.
- Customize financial advice to support your proposed solutions.
- Diversify your product offerings to accommodate the changing landscape of commissions and fees.

Here's how we stand out.

Questar Asset Management can help you fully leverage these industry-leading tools and resources to effectively compete, and grow, your fee-based business model:

- Third-party money managers
- Discounted access to financial planning software
- Digital capabilities that put the service you need all in one place and at your fingertips
- Questar Asset Management provides comprehensive education and support for your business

VISION
We are the premier partner of choice for the independent financial professional.

MISSION
We deliver resources allowing our financial professionals to achieve success.

CORE NICHE
Personal attention backed by global strength.

CORE FOCUS
The freedom to succeed ... powered by Questar.

CORE VALUES
The E's of doing business: Ethical | Entrepreneurial | Efficient | Engaged | Empowered

PUT OUR RIA PLATFORM TO WORK FOR YOU.

Your clients' investment needs may not fit neatly into a pre-determined category. That's why Questar Asset Management provides a multitude of solutions to meet their individual financial needs.

WEALTH MANAGEMENT PLATFORM

Envestnet – experience the power of integration with:

Integrated proposal tool powered by Morningstar data

- Customizable proposal output
- Client-facing side-by-side comparisons

Portfolio Management Consultant (PMC)

- Premium advanced research analysis
- Prescreened approved and select lists
- Personal advisor consultations on mutual funds, ETFs, fund strategist portfolios, and SMAs

Robust reporting

- Book of business reporting
- Holdings analysis
- Client and AUM reporting

Competitively priced

- We benchmarked our fees against other firms to ensure competitive pricing

LEVERAGING PARTNERS TO BUILD STRENGTH

Among the many programs you will see across our DIMENSION platforms, we are excited to provide you with this unique partnership.

questar strategic designs

Exclusive to Questar Asset Management, Questar Strategic Designs offers a series of 10 proprietary models comprised of five Dimensional portfolios and five ETF portfolios. We have enlisted the expertise of an affiliated partner from within the Allianz family, Allianz Investment Management (AIM), to help create and direct the Questar Strategic Designs Portfolios. By leveraging AIM's institutional relationship we are able to bring Dimensional portfolios to you at a retail level.

Why Questar Strategic Designs?

1. Broad market exposure
   The portfolios are constructed to let clients effectively diversify equity risk by investing across different regions, market capitalizations, and countries.
2. Transparent and easy-to-understand solutions
   A strategic asset allocation approach, achieved using a select group of funds, allows for appropriate diversification based on clients' needs and risk tolerance.
3. Institutional access
   The portfolios provide institutional access and professional management with a strong asset allocation process and ongoing oversight to augment an advisor's practice.

Core DFA Portfolios

Dimensional Fund Advisors has been translating academic research into practical investment solutions since 1981, and its investment process was designed and supported by decades of research from leading financial economists. This vigorous exchange of ideas between their internal resources and highly respected outside academics allows Dimensional Fund Advisors to bring the ideas of financial science to life for investors.

Partnering with third-party money managers

After extensive due diligence we selected three strategic partners:

- AssetMark
- FTJ Fundchoice
- SEI

These direct relationships offer you access to internal and external wholesalers who provide:

- Training
- Selecting the most appropriate investment option
- Assessing client risk tolerance
- Practice-management support

QUESTAR ASSET MANAGEMENT DIMENSION SERIES

Not everyone's business model and experience level are the same. That's why we created three distinct — yet flexible — paths with our DIMENSION Series.

DIMENSION TURNKEY

Expand your capabilities and revenue opportunities while effectively managing your time. Designed for advisors who want a curated list of third-party-managed ETF and mutual fund portfolios, and who seek to minimize time spent on due diligence and manager selection.

Strategic Designs + fund strategist portfolios + direct third-party money managers

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Time, due diligence, complexity

DIMENSION ADVANTAGE

Advantage is designed for advisors who are interested in doing more of their own manager selection and due diligence from a broader list of third-party-managed mutual fund and ETF portfolios, or for functioning as a portfolio manager. Portfolio Designs Select provides access to a prescreened list of mutual funds as well as broad access to ETFs for advisors who are interested in executing their own investment thesis as a portfolio manager.

Strategic Designs + fund strategist portfolios + direct third-party money managers + portfolio designs advantage

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Time, due diligence, complexity

DIMENSION WEALTH MANAGEMENT

Wealth Management is designed for advisors who are interested in executing their own investment thesis using individual securities, mutual funds, and ETFs. Portfolio Designs provides broad access to securities, including the flexibility to execute your own mutual fund selection process or use prescreened lists. In addition, advisors will have access to a broad list of prescreened third-party-managed mutual fund and ETF portfolios, separately managed accounts, and the ability to combine all of the above into a single account, or unified managed account (UMA).

Strategic Designs + fund strategist portfolios + direct third-party money managers + portfolio designs + separately managed accounts + unified managed accounts

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Time, due diligence, complexity

DISCOVER THE VALUE OF FINANCIAL ADVICE.

Questar Asset Management provides a platform that allows you to be compensated for the most valuable thing you provide: you!

What's the value of providing advice?

As an advisor, you bring more to client relationships than products and financial projections. You are bringing your financial expertise, which is irreplaceable. Every client is different, and the advice you offer can make all the difference in their financial lives. At Questar Asset Management, we believe in your freedom to succeed — in the unique and transformative power of you. Earn compensation for your expertise, because the advice you provide is real and tangible.

Advisors who practice financial planning typically earn 3.5 to 5 times more per household than "transactional" reps. These advisors usually sell a diverse set of products and solutions, as the advice process uncovers a wider variety of needs. Advisors engaged in financial advice relationships generally have higher retention rates, too. Comprehensive financial planning will help you deepen your relationships with clients — and it can also add stability and predictability to your business model.

WE ALIGN YOUR PRACTICE WITH THE TOOLS YOU NEED.

You need the right digital tools to support your financial advice relationship. Questar Asset Management offers comprehensive digital advice capabilities, including the following:

ENVESTNET | YODLEE — is the leading digital platform for data aggregation, data analytics, and personal wealth management. This client-facing app allows you to find out how clients are spending their money and translate spending patterns into actionable insights. As clients link accounts you will see held away assets, insurance products, and more, giving you a snapshot of their entire financial picture.

BROADRIDGE — supports your fee-based advice with topical compliance-approved calculators. In addition, educational materials and illustrations enrich client engagement.

MONEYGUIDEPRO — is a client-centered Web-based financial and retirement planning software for fast and easy goal planning. It increases your efficiency and enables you to add value to the planning process based on your experience, knowledge, and relationship.

BENEFIT FROM BUSINESS-MANAGEMENT TOOLS

- ACCOUNT AGGREGATION
- COMPREHENSIVE FINANCIAL PLANNING
- ADVICE/RECOMMENDATION/RATIONALIZATION
- ARCHIVE SOLUTION

TAKE THE NEXT STEP

Call us or visit us online to learn how we can help you deepen your client relationships.
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