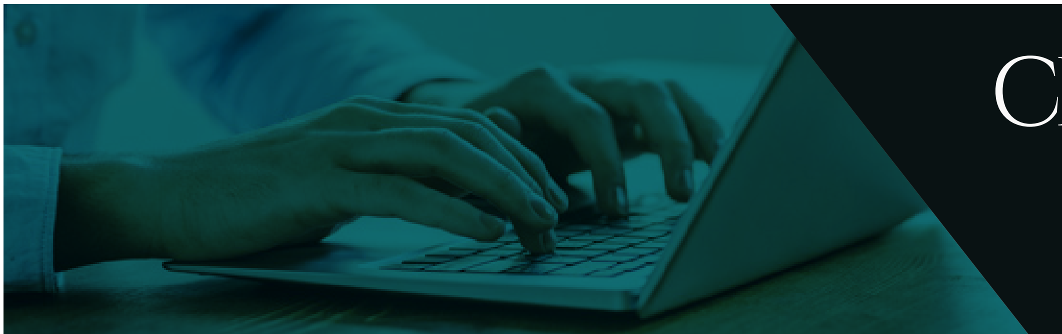

CPM CREATIVE PORTFOLIO MANAGEMENT

Still Burning Hours as Your Own Portfolio Manager?

Shift the Heavy Lifting to CPM's Turnkey Asset Management Program

What Changes When You Partner with CPM?

Benefit	
A Team Behind You	Give your clients confidence by showing that you have a team of professionals behind you dedicated to achieving their goals.
More Time for Clients	With account monitoring, rebalancing, and trade execution off your plate, you gain valuable hours each week. Use that time to deepen client relationships.
Traditional and BRI Models	Support a wider range of client goals with access to a broad range of Traditional and Biblically Responsible Investing (BRI) strategies, all in one place.
Stabilized Succession Planning	Whether you scale, sell, or step back, CPM's turnkey process keeps portfolios running seamlessly, preserving client confidence and practice value.

CPM enhances your value by helping you deliver professional portfolio management without additional staff. Our team extends your capabilities so you can focus more on clients and growth while we handle the day-to-day investment operations behind the scenes.

Less Time Managing. More Time Advising.

Learn More.
Jamie.Barber@creativeportfoliomanagement.com • 800.745.7776 • www.creativeportfoliomanagement.com

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