



What We Do For You

Freedom Capital Management Strategies 401(k) service is an active management investment tool for participants of 401(k) retirement plans. The reason this service has been created is to provide participants with a process for reallocation of their 401(k) accounts to reflect changes in global macro-economic policies and events. Subscribers to Freedom Capital Management Strategies 401(k) service will receive periodic market and economic reporting that reflects the economic committee's current thoughts regarding the global capital markets. These portfolio recommendations will then be reflected in each customized investment model built for your company's 401(k) plan and your personal allocation strategy.



How We Keep You Informed

Every time the economic committee makes allocation changes to your customized model, you will receive immediate communication so that you can log-in to the site and get the recommended changes. Once you have received the information all that you have to do is log-in to your company 401(k) site and reallocate your holdings to reflect your recommended model. Even though Freedom Capital Management Strategies 401(k) service can't make the recommended changes in your company 401(k) plan (perform the actual trades or reallocation), we provide you all the necessary information to make the changes yourself, easily.



The screenshot shows the Freedom Capital Management Strategies™ logo and a 'Your Secure 401k Portal' button. Below the logo is a navigation menu with links: MY 401K DASHBOARD, INVESTMENT MODELS, MY ACCOUNT, ABOUT MY ADVISOR, and ABOUT THE SERVICE. The main content area displays a 'Welcome' message with the last log-in date and time. A featured article titled '2nd Quarter Market Commentary' by Founders Financial, dated March 23, 2011, is highlighted. The article text discusses the economic recovery and the committee's stance on equity allocation.

Unique 401k Portal Features

Your 401k Dashboard

Upon logging in to the site you will be taken to your 401k Dashboard. From this page you have access to research all other investment models, view/edit your account, view your advisors profile and contact information as well as read about the FCMS 401k Service. This page is also where you will be notified of any pertinent communications or updates via the alert widget.



Investment Model Information



There is an entire section of the site dedicated to giving you a full explanation of the objectives of each of the investment models along with a description of what type of investor each model is appropriate for. Further, each link within the page will provide information for each model that indicates the possible range of exposure to equities and fixed income. Each time the economic committee makes a change to the models, it will be bound by the investment policies found under each model description located in this section. Each investment model has its own page with its description on it and will show you the minimum and maximum exposure to each asset class through Freedom Capital Management Strategies 401k

Information About Your Advisor & Your Account

You will be provided with a complete profile listing for your Advisor that you may view any time you are within your secure portal. This listing will have your Advisors name, phone number, website and provide you with a short biography of themselves and their services. You will also be able to navigate to your Advisors website from this page as well. Additionally, you will have access to your FCMS 401k basic account information which you may edit this information at any time.