NEW FRONTIER

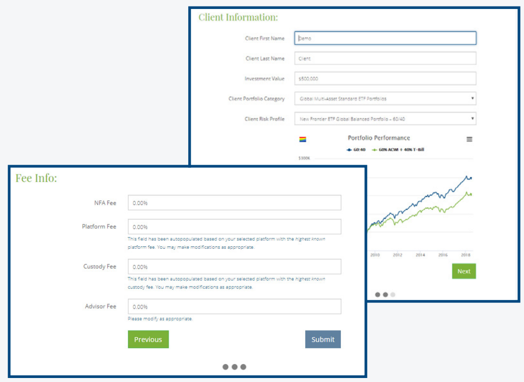
New Frontier Proposal Engine

Quick Guide

Designed with advisor needs in mind, New Frontier's Proposal Engine offers a simple and effective way to educate your clients about how a New Frontier portfolio can help them achieve their financial goals.

Customizable inputs

Using our clean, intuitive interface, generate a proposal that reflects the needs of your client, as well as your specific fee schedule.



Detailed portfolio description and analytics

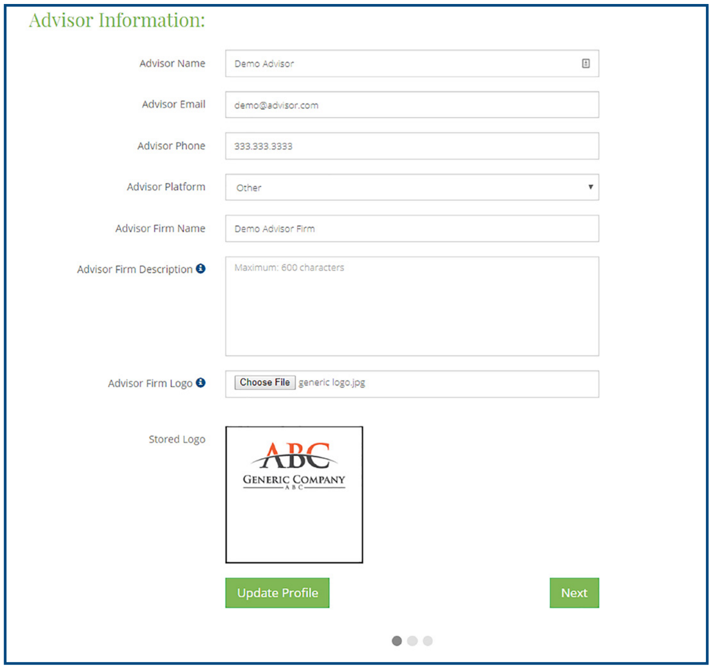
Provide your client with a strong understanding of the New Frontier portfolio you have selected for them. We include in the proposal a detailed description of the portfolio, as well as composition information and performance analytics.

Comprehensive educational material

Offer your client an opportunity to learn more about why you choose to work with New Frontier. Our proposals include an explanation of our investment philosophy and process to ensure that investors feel confident in not just their portfolios, but also in the engine that powers them.

Running a New Frontier Proposal

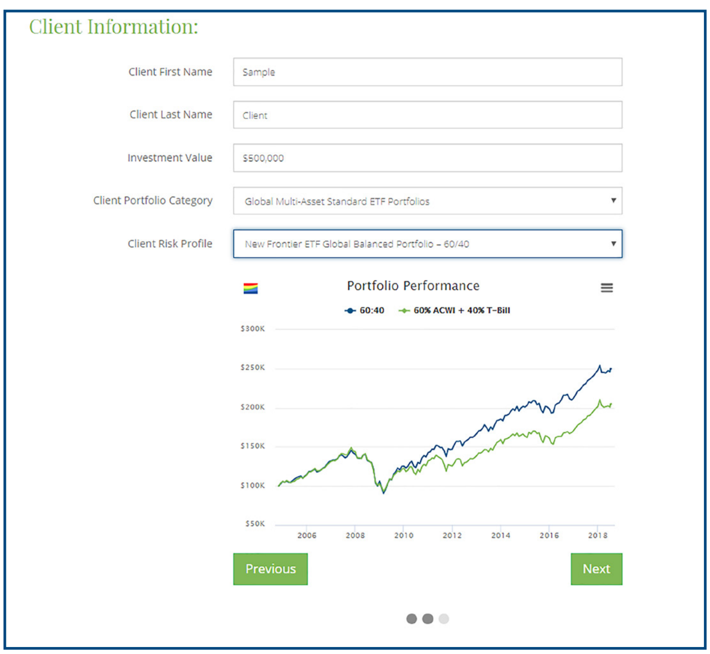
To access the New Frontier Proposal Engine, log on to **FrontierAdvisor**, and select **Tools > Proposal Engine.**



Step 1: Advisor information

The initial screen covers basic advisor information and also offers the option to include a firm description and logo.

Note that these fields will auto-populate with the information in your user profile. You will have the option to save any changes to your profile for future use.

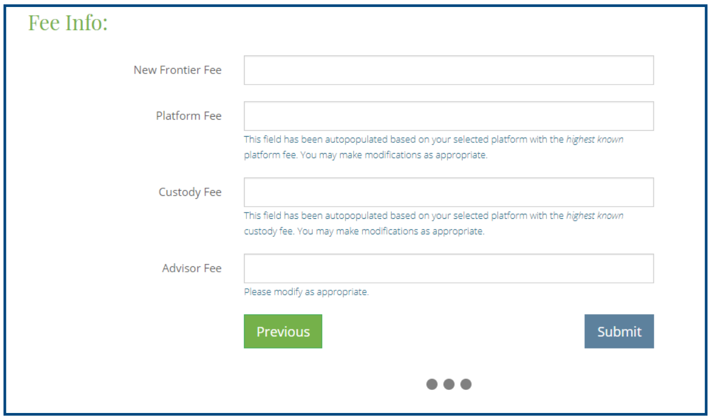


Step 2: Client information

The second screen requests basic client information. This is where you will select the appropriate portfolio for your client.

Once a portfolio has been chosen, a preview of the gross performance of the model against its risk-appropriate benchmark will appear for reference.

Upon completion of this screen, you will be prompted to confirm that the portfolio you have selected is suitable for your client's investment objectives.


Fee Info:

New Frontier Fee

Platform Fee

This field has been autopopulated based on your selected platform with the *highest known* platform fee. You may make modifications as appropriate.

Custody Fee

This field has been autopopulated based on your selected platform with the *highest known* custody fee. You may make modifications as appropriate.

Advisor Fee

Please modify as appropriate.

Previous Submit

Step 3: Fee information

The third and final screen addresses the inclusion of Strategist, Platform, Custody, and Advisor fees.

These fields will auto-populate with applicable fees based on your platform, and you will then have the option to adjust them to reflect your current agreements.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NewFrontierAdvisors.com

NEW FRONTIER

INVESTMENT
PROPOSAL

ABC GENERIC COMPANY

Prepared for
Sample Client

On Behalf of
Demo Advisor

Demo Advisor Firm
demo@advisor.com
333.333.3333

07/23/2018

For financial advisor use with clients.

Step 4: Generate proposal

Once you submit your information, a full proposal packet will be generated, customized for your client.

The proposal provides an overview of the New Frontier portfolio you have selected, along with performance analytics reflective of your fee schedule.

In addition, it offers a comprehensive overview of New Frontier's innovative investment philosophy and process, equipping you with a powerful tool for client education.

NEW FRONTIER

Contact us for more information.

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DISCLOSURES: Past performance does not guarantee future results. New Frontier does not provide any direct investment advice to Financial Advisors' clients.