BLACKROCK® | LPL Financial

Managed Portfolio Strategies

Delivered on the LPL Model Wealth Portfolio (MWP) Program

Draw on the strategic insights and tactical expertise of BlackRock through the Managed Portfolio Strategies available on LPL Model Wealth Portfolio (MWP) Program. These managed account solutions may be the core investment option you're looking for.*

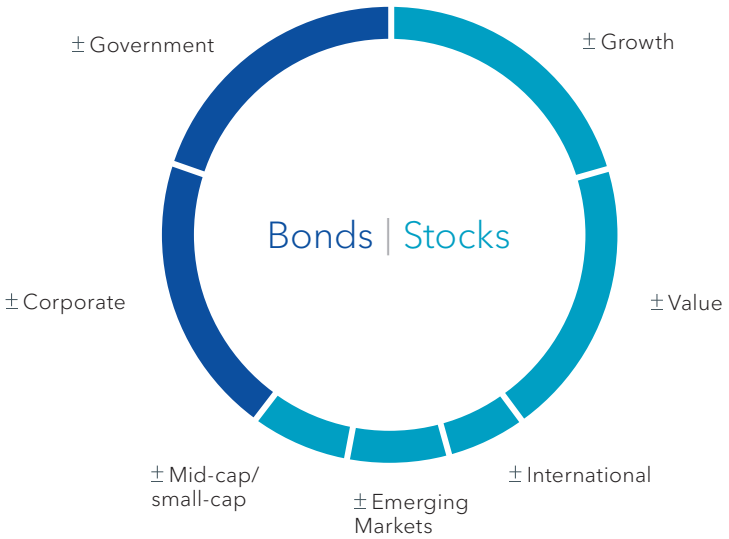
* The implementation of, or reliance on, a Managed Portfolio Strategy is left to the discretion of you or your firm (collectively, the "Advisor"). BlackRock is not responsible for determining the securities to be purchased, held and sold for a client's accounts, nor is BlackRock responsible for determining the suitability or appropriateness of a Managed Portfolio Strategy or any securities included therein for any of the Advisor's clients. BlackRock does not place trade orders for any of the Advisor's clients' accounts. Information and other marketing materials provided to your Advisor by BlackRock concerning a Managed Portfolio Strategy – including holdings, performance and other characteristics – may not be indicative of a client's actual experience from an account managed in accordance with the strategy.

Build a healthy financial future

Preserving today's dollar may not be enough for tomorrow's needs. Whether you are near or far from retirement, you may need to do more to build a healthy financial future in the current environment.

Find ways to make diversification easier

Use a professionally selected and balanced mix of fixed income (bond) and equity (stock) investments to help meet your long-term goals.



For illustrative purposes only. +/- Allocations can vary 5%

A simpler way to build your diversified portfolio

BlackRock Managed Portfolio Strategies are designed to be your all-in-one core portfolio strategy. Access these cost-effective managed portfolio strategies in a separate account managed by LPL Financial.

1
All-in-one, core portfolios

2
Skillfully crafted cost-effective ETF allocations

3
Strategically balanced results and risk

Investment expertise simply delivered

BlackRock Managed Portfolio Strategies are built around a platform of skilled investors that are globally connected and seek to leverage cutting edge technology to control costs, capture opportunities and manage risk.

1
All-in-one, core portfolios

A well-built asset allocation is key to generating the investment returns you are looking for, at a level of risk that makes you comfortable.

2
Skillfully crafted cost-effective ETF allocations

BlackRock's portfolio management team seeks to identify investment opportunities, choosing from a wide universe of cost-effective ETFs and tailoring portfolio strategies to specific risk exposures.

3
Strategically balanced results and risk

To evaluate each managed portfolio strategy, BlackRock's portfolio management team is harnessing the collective intelligence of Aladdin® – BlackRock's proprietary risk management engine relied on to analyze over $15 trillion globally,[1] including every dollar BlackRock manages.

What are exchange traded funds (ETFs)?

Diversified funds that trade like stocks.

Low cost

ETFs are generally a cost-effective investment option

Tax efficient

ETFs can provide a tax-efficient solution for some investors impacted by rising taxes

Competitive performance

ETFs seek consistent index-like performance

1 Source: BlackRock data as of 12/31/2016

A range of outcomes

Depending on your investment time-horizon and how much risk you are comfortable taking, BlackRock Managed Portfolio Strategies on the LPL Model Wealth Portfolios Program can offer a wide range of solutions to help meet your investment goals.

Access to BlackRock with low to no overlay fees

BlackRock has low or no external strategist or "overlay" fees in the LPL MWP program.

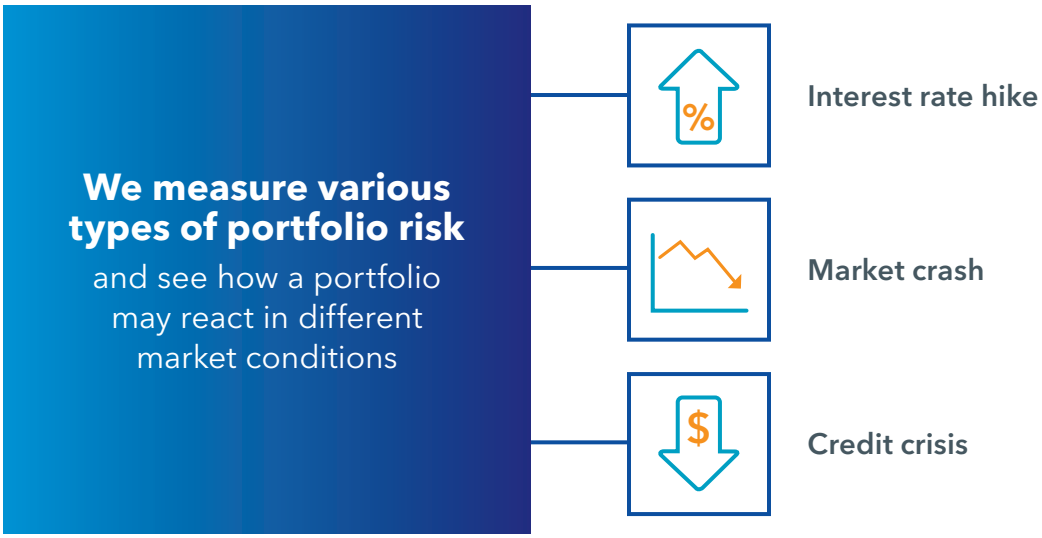
Source: BlackRock as of December 31, 2016. * Basis points are a unit relating to interest rates that is equal to 1/100th of a percentage point. It is frequently but not exclusively used to express differences in interest rates of less than 1%.

Maximize the upside and minimize the downside

Amidst today's global market volatility, investors are focused on maximizing portfolio efficiency. **Managed Portfolio Strategies seek to generate the most reward for a given level of risk**.

To evaluate each managed portfolio strategy we've harnessed the collective intelligence of Aladdin® – BlackRock's proprietary risk management engine relied on to analyze over $15 trillion globally,[1] including every dollar BlackRock manages. It allows us to see what is contributing to risk in each strategy, helping us really know what we own.

Putting Managed Portfolio Strategies to the test



1 Source: BlackRock data as of 12/31/2016

Want to know more?

blackrock.com

Why BlackRock

BlackRock helps people around the world, as well as the world's largest institutions and governments, pursue their investing goals. We offer:

- A comprehensive set of innovative solutions, including mutual funds, separately managed accounts, alternatives and iShares® ETFs
- Global market and investment insights
- Sophisticated risk and portfolio analytics

We work only for our clients, who have entrusted us with managing $5.14 trillion*, earning BlackRock the distinction of being trusted to manage more money than any other investment firm in the world.

Want to know more?


blackrock.com

* AUM as of 12/31/16.

Investing involves risk, including possible loss of principal. *Asset allocation and diversification may not protect against market risk, loss of principal or volatility of returns. Actual investment outcomes may vary. The model portfolios should not be construed as investment advice. There is no guarantee that these investment strategies will work under all market conditions or are suitable for all investors and each investor should evaluate their ability to invest long-term, especially during periods of downturn in the market. No representation is being made that any account, product, or strategy will or is likely to achieve profits. The above are representations of various model portfolios and no guarantee is being made that the structure of other similar portfolios will remain the same or that similar results will be achieved.*

Important Notes: In the event that BlackRock provides you or your firm (collectively, the "Advisor") with BlackRock Managed Portfolio Strategies for compensation, BlackRock's role is limited to providing the Advisor with non-discretionary investment recommendations in the form of model portfolios in connection with its management of its clients' accounts. The implementation of, or reliance on, a Managed Portfolio Strategy is left to the discretion of the Advisor. BlackRock is not responsible for determining the securities to be purchased, held and sold for a client's accounts, nor is BlackRock responsible for determining the suitability or appropriateness of a Managed Portfolio Strategy or any securities included therein for any of the Advisor's clients. BlackRock does not place trade orders for any of the Advisor's clients' account. Information and other marketing materials provided to you by BlackRock concerning a Managed Portfolio Strategy – including holdings, performance and other characteristics – may not be indicative of a client's actual experience from an account managed in accordance with the strategy.

Securities and advisory services are offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC. LPL Financial and BlackRock Investments are not affiliates of each other and make no representation with respect to each other.

Not FDIC Insured • May Lose Value • No Bank Guarantee

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