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# P-Cubed: Pathstone Portfolio Platform

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The Pathstone Portfolio Platform (P-Cubed™) is a proprietary investment execution methodology that provides the ability for investors to hold diverse investments with customization in a single account. The primary goal is to increase efficiencies and lower overall portfolio expenses. We continue to innovate our platform, regularly making significant enhancements. Today P-Cubed™ not only provides meaningful expense and operating efficiencies, but also delivers investors the power to customize and control their portfolios in ways we believe not before possible.

### What are the benefits?

- Single Account & Simplified Tax Reporting
- Fee Savings
- Tax Savings
- Dynamic Rebalancing & Cash Management
- Customized Portfolio Construction

### Impact: The Added Benefits of P-Cubed™

- ESG Management & Value Alignment
- ESG Directed Proxy Voting
- Shareholder Engagement
- Multi-Tiered & All-Encompassing Reporting

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