



As of 09/30/2024

Investment Objective and Strategy

The 3D Global 100 Portfolio is designed for aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 100% exposures to equities by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of MSCI All-Country World Index. The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility.

Investor Profile

Designed for investors with the highest risk tolerance who want to maximize their return potential and can handle high short-term account volatility and have an investment time horizon over ten years.

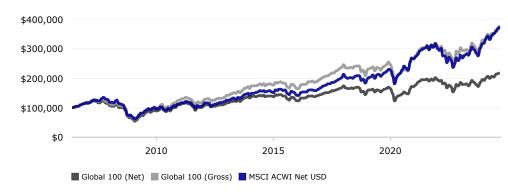
Risk Rating: Aggressive Allocation



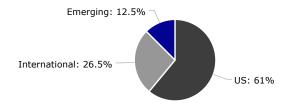
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 100 (Net)	6.78%	11.72%	22.26%	4.75%	6.70%	4.84%	4.36%
Global 100 (Gross)	7.56%	14.22%	25.90%	7.92%	9.92%	8.01%	7.53%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	9.39%	7.51%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

,	110101110		
	Global 100 (Net)	Global 100 (Gross)	MSCI ACWI Ne USD
2024	11.72	14.22	18.66
2023	13.18	16.59	22.20
2022	-13.98	-11.33	-18.36
2021	17.61	21.14	18.54
2020	0.59	3.66	16.24
2019	17.74	21.28	26.60
2018	-13.93	-11.28	-9.41
2017	19.10	22.67	23.97
2016	7.70	10.96	7.86
2015	-5.62	-2.73	-2.36
2014	1.31	4.39	4.16





As of 09/30/2024

Portfolio Holdings*

Name	Asset Class	Symbol	Holdings
Vanguard Value ETF	Large Cap Value	VTV	345
Dimensional US High Profitability ETF	Large Cap Blend	DUHP	181
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE	80
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM	544
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV	979
Dimensional International Core Eq 2 ETF	Developed Large	DFIC	4110
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU	369
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE	5834
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV	2818
Dimensional US Equity Market ETF	Large Cap Blend	DFUS	2513
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC	1248
Avantis International Small Cp Eq ETF	Developed Large	AVDS	2668

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Portfolio Characteristics³

Standard Deviation	16.67%
Sharpe Ratio	0.34
Portfolio Yield	2.09%
Number of Securities	21729
Effective Duration	N/A
Weighted Average Fund Expense	0.25%
Weighted Average Credit Rating	N/A

Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

Credit Rating

No data filled

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolios()"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance `The 3D Global 100 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 100 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 100% equity exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.







As of 09/30/2024

Investment Objective and Strategy

The 3D Fixed Income Tax-Sensitive Portfolio is designed for investors looking for a broadly diversified fixed income portfolio comprising primarily of U.S. state and local municipal bonds exempt from federal taxation. The Portfolio uses exchange-traded funds (ETFs)† to target 100% exposure to fixed income securities by broadly diversifying across hundreds of bonds. The Portfolio seeks current income and portfolio stability by miniming the short-term impact of any single bond on Portfolio performance. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a the Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio favors fixed income sectors that produce superior income while more than compensating for the inherent risks to that income such as inflation, changes in interest rates, and default risk.

Investor Profile

Designed for investors with a conservative risk tolerance who seek to experience lower account volatility with an investment time horizon of less than five years.

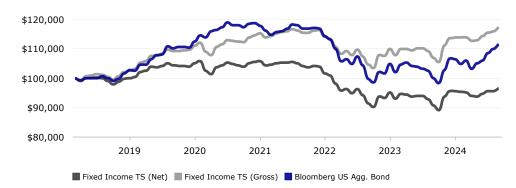
Risk Rating: Conservative Allocation



Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Fixed Income TS (Net)	1.87%	0.92%	6.37%	-2.48%	-1.56%	-	-0.56%
Fixed Income TS (Gross)	2.63%	3.20%	9.57%	0.49%	1.43%	-	2.46%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	_	1.67%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Renefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Fixed Income TS (Net)	Fixed Income TS (Gross)	Bloomberg US Agg. Bond
2024	0.92	3.20	4.46
2023	2.51	5.62	4.93
2022	-10.28	-7.52	-13.01
2021	-1.54	1.46	-1.55
2020	1.51	4.59	7.50
2019	4.21	7.37	8.73
2018	-0.29	1.98	1.50





As of 09/30/2024

Port	foli	οН	ol	din	as*

Nama

Name	Asset Class	Syllibol	Holdings
First Trust Managed Municipal ETF	Intrm-Term Muni	FMB	1354
JPMorgan Municipal ETF	Intrm-Term Muni	JMUB	861
JPMorgan Ultra-Short Municipal Inc ETF	Ultra-Short Muni	JMST	2703
Xtrackers Municipal Infras Rev Bd ETF	Long-Term Muni	RVNU	336

Accet Class

Portfolio Characteristics³

Standard Deviation	4.77%
Sharpe Ratio	-0.09
Effective Duration	6.35
Portfolio Yield	3.17%
Weighted Average Credit Rating	Aa3/AA-
Weighted Average Fund Expense	0.27%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

AAA	57.44 %
BBB	0.00 %
BB	0.00 %
В	0.10 %
CCC	0.00 %
Others	42.46 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolios)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

Cymphal

Haldings

¹Performance The 3D Fixed Income Tax-Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Fixed Income Tax-Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 100% tax-sensitive fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of less.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates can lead to lower portfolio values and vice versa.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





FIXED INCOME

As of 09/30/2024

Investment Objective and Strategy

The 3D Fixed Income Portfolio is designed for investors looking for a broadly diversified fixed income portfolio comprising of multiple types of fixed income securities including corporate bonds, government bonds, mortgage-backed/asset-backed securities, and below investment-grade securities. The Portfolio uses exchange-traded funds (ETFs)† to target 100% exposure to fixed income securities by broadly diversifying across hundreds of bonds across multiple market segments. The Portfolio seeks current income and portfolio stability by miniming the short-term impact of any single bond on Portfolio performance. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a the Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio favors fixed income sectors that produce superior income while more than compensating for the inherent risks to that income such as inflation, changes in interest rates, and default risk.

Investor Profile

Designed for investors with a conservative risk tolerance who seek to experience lower account volatility with an investment time horizon of less than five years.

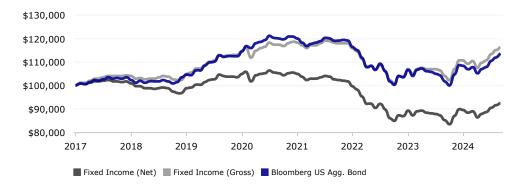
Risk Rating: Conservative Allocation



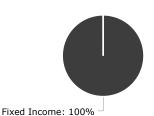
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Fixed Income (Net)	4.35%	2.84%	8.56%	-3.43%	-2.31%	-	-1.03%
Fixed Income (Gross)	5.12%	5.15%	11.82%	-0.49%	0.66%	-	1.99%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	_	1.66%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Fixed Income (Net)	Fixed Income (Gross)	Bloomberg US Agg. Bond
2024	2.84	5.15	4.46
2023	3.41	6.54	4.93
2022	-14.51	-11.88	-13.01
2021	-3.63	-0.69	-1.55
2020	1.85	4.94	7.50
2019	7.16	10.40	8.73
2018	-4.84	-1.93	0.01
2017	1.54	4.37	3.34





FIXED INCOME

Portfolio Characteristics³

As of 09/30/2024

1.52%

5.31%

Portfolio Holdings*	Portf	olio	Holo	dinas*
---------------------	-------	------	------	--------

Name			Asset	Class	Symbol	Holdings	Standard Deviation	5.05%
Invesco Taxable Municipal Bond E	TF		Taxab	le Muni	BAB	639	Sharpe Ratio	-0.18
PIMCO Active Bond ETF			Intrm	Intrm-Term IG		1248	Effective Duration	6.38
T IN CO / LETVE BOILD ETT			11101111	Termino	BOND	1240	Portfolio Yield	4.31%
WisdomTree Yield Enhanced US A	ggt Bd ETF		Intrm	-Term IG	AGGY	2692	Weighted Average Credit Rating	Aa2/AA-
In Land Book and a second							Weighted Average Fund Expense	0.43%
Index Performance							Credit Deting	
	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	Credit Rating	
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%	AAA	77.51%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%	BBB	13.85 %
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%	BB	1.23 %
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%	В	0.57 %

Disclaimer

MSCI Emerging Markets

Bloomberg US Agg. Bond

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolios)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

3.18%

0.22%

18.41%

6.22%

CCC

Others

22.90%

11.58%

-2.24%

-1.57%

7.79%

5.20%

14.37%

4.46%

¹Performance The 3D Fixed Income Portfolio Composite includes all discretionary accounts that are managed to the 3D Fixed Income Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 100% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates can lead to lower portfolio values and vice versa.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





GLOBAL 20 TAX-SENSITIVE

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 20 Tax-Sensive Portfolio is designed for conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 20% / 80% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 20% MSCI All-Country World Index ("ACWI") and 80% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a conservative risk tolerance who seek to experience lower account volatility with an investment time horizon of less than five years.

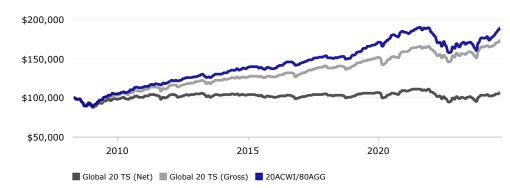
Risk Rating: Conservative Allocation



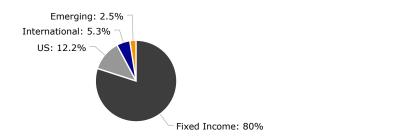
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 20 TS (Net)	2.84%	3.05%	9.73%	-1.01%	0.15%	0.32%	0.36%
Global 20 TS (Gross)	3.60%	5.36%	13.02%	2.00%	3.19%	3.37%	3.41%
20ACWI/80AGG	5.48%	7.20%	15.42%	0.41%	2.69%	3.43%	3.97%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Ronofite

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

Global 20 TS (Net)	Global 20 TS (Gross)	20ACWI/80AGG
3.05	5.36	7.20
4.94	8.11	8.26
-11.03	-8.30	-13.94
1.59	4.68	2.27
1.90	5.00	9.72
6.60	9.82	12.27
-4.74	-1.83	-1.78
5.18	8.36	7.37
-1.12	1.89	3.79
-2.35	0.63	0.17
0.00	3.05	5.66
	(Net) 3.05 4.94 -11.03 1.59 1.90 6.60 -4.74 5.18 -1.12 -2.35	(Net) (Gross) 3.05 5.36 4.94 8.11 -11.03 -8.30 1.59 4.68 1.90 5.00 6.60 9.82 -4.74 -1.83 5.18 8.36 -1.12 1.89 -2.35 0.63





GLOBAL 20 TAX-SENSITIVE

As of 09/30/2024

0.00%

Portfol	io Ho	ldina	ıs*
----------------	-------	-------	-----

Name	Asset Class	Symbol	Holdings
Vanguard Value ETF	Large Cap Value	VTV	345
Dimensional US High Profitability ETF	Large Cap Blend	DUHP	181
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE	80
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM	544
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV	979
Dimensional International Core Eq 2 ETF	Developed Large	DFIC	4110
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU	369
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE	5834
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV	2818
JPMorgan Ultra-Short Municipal Inc ETF	Ultra-Short Muni	JMST	2703
JPMorgan Municipal ETF	Intrm-Term Muni	JMUB	861
First Trust Managed Municipal ETF	Intrm-Term Muni	FMB	1354
Xtrackers Municipal Infras Rev Bd ETF	Long-Term Muni	RVNU	336
Dimensional US Equity Market ETF	Large Cap Blend	DFUS	2513
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC	1248
Avantis International Small Cp Eq ETF	Developed Large	AVDS	2668

Portfolio Characteristics³

Standard Deviation	5.35%
Sharpe Ratio	0.09
Portfolio Yield	2.95%
Number of Securities	26641
Effective Duration	6.35
Weighted Average Fund Expense	0.26%
Weighted Average Credit Rating	Aa3/AA-
Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

Other

AAA	57.44 %
BBB	0.00 %
BB	0.00 %
В	0.10 %
CCC	0.00 %
Others	42.46 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolios)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 20 - Tax Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 20 - Tax Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 20% equity exposure and 80% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of less than their original cost. As with any investment with a less than their original cost.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





As of 09/30/2024

Investment Objective and Strategy

The 3D Global 20 Portfolio is designed for conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 20% / 80% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 20% MSCI All-Country World Index ("ACWI") and 80% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a conservative risk tolerance who seek to experience lower account volatility with an investment time horizon of less than five years.

Risk Rating: Conservative Allocation



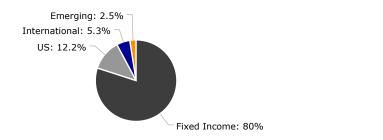
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 20 (Net)	3.77%	4.50%	9.79%	-1.53%	-0.23%	0.39%	1.08%
Global 20 (Gross)	4.53%	6.85%	13.09%	1.47%	2.80%	3.44%	4.15%
20ACWI/80AGG	5.48%	7.20%	15.42%	0.41%	2.69%	3.43%	4.42%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 20 (Net)	Global 20 (Gross)	20ACWI/80AG
2024	4.50	6.85	7.20
2023	4.85	8.03	8.26
2022	-13.17	-10.50	-13.94
2021	0.73	3.79	2.27
2020	1.77	4.86	9.72
2019	8.63	11.91	12.27
2018	-6.76	-3.91	-1.78
2017	5.48	8.67	7.37
2016	2.72	5.84	3.79
2015	-3.18	-0.23	0.17
2014	0.04	3.08	5.66





Symbol

AVDS

AVSC

DFAE

DFEV

DFIC

DFUS

DUHP

DFSV

BAB

IVLU

KVLE

BOND

VTV

EZM

AGGY

Holdings

2668

1248

5834

2818

4110

2513

181

979

639

369

80

1248

345

544

2692

r v., o.d D...

GLOBAL 20

As of 09/30/2024

Portfolio Holdings*

Name	Asset Class
Avantis International Small Cp Eq ETF	Developed Large
Avantis US Small Cap Equity ETF	Small Cap Blend
Dimensional Emerging Core Equity Mkt ETF	Developed Small
Dimensional Emerging Markets Value ETF	Emerging Large
Dimensional International Core Eq 2 ETF	Developed Large
Dimensional US Equity Market ETF	Large Cap Blend
Dimensional US High Profitability ETF	Large Cap Blend
Dimensional US Small Cap Value ETF	Small Cap Blend
Invesco Taxable Municipal Bond ETF	Taxable Muni
iShares Edge MSCI Intl Value Factor ETF	Developed Large
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend
PIMCO Active Bond ETF	Intrm-Term IG
Vanguard Value ETF	Large Cap Value
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend
WisdomTree Yield Enhanced US Aggt Bd ETF	Intrm-Term IG
Index Performance	

Portfolio Characteristics³

Standard Deviation	5.63%
Sharpe Ratio	0.22
Portfolio Yield	3.86%
Number of Securities	26308
Effective Duration	6.38
Weighted Average Fund Expense	0.39%
Weighted Average Credit Rating	Aa2/AA-

otor Proakdown

Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

	3 mo	YIU	1 Year	3 Year	5 Year	5 Yr. Sta Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5.31 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and Exchange3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 20 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 20 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 20% equity exposure and 80% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein





As of 09/30/2024

Investment Objective and Strategy

The 3D Global 30 Portfolio is designed for conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 30% / 70% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 30% MSCI All-Country World Index ("ACWI") and 70% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a conservative risk tolerance who seek to experience lower account volatility with an investment time horizon of less than five years.

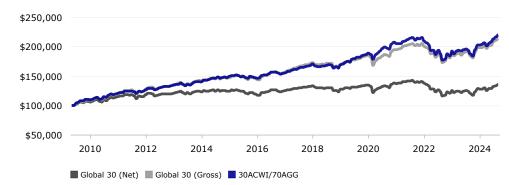
Risk Rating: Conservative Allocation



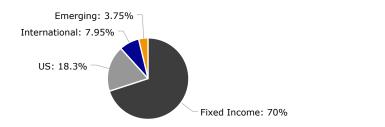
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 30 (Net)	5.05%	5.65%	12.65%	-0.96%	0.51%	0.92%	1.99%
Global 30 (Gross)	5.82%	8.02%	16.03%	2.05%	3.57%	3.98%	5.09%
30ACWI/70AGG	5.62%	8.59%	17.37%	1.39%	3.92%	4.22%	5.28%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 30 (Net)	Global 30 (Gross)	30ACWI/70AGG
2024	5.65	8.02	8.59
2023	6.21	9.43	9.95
2022	-14.32	-11.68	-14.43
2021	2.13	5.23	4.22
2020	2.44	5.55	10.75
2019	9.85	13.16	14.05
2018	-7.52	-4.69	-2.70
2017	7.07	10.31	9.34
2016	3.34	6.47	4.34
2015	-3.48	-0.53	-0.08
2014	0.12	3.17	5.50





Holdings

2668 1248

5834

2818 4110

2513

80

GLOBAL 30

As of 09/30/2024

Portfolio Holdings*

Name	Asset Class	Symbol
Avantis International Small Cp Eq ETF	Developed Large	AVDS
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV
Dimensional International Core Eq 2 ETF	Developed Large	DFIC
Dimensional US Equity Market ETF	Large Cap Blend	DFUS
Dimensional US High Profitability ETF	Large Cap Blend	DUHP
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV
Invesco Taxable Municipal Bond ETF	Taxable Muni	BAB
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE
PIMCO Active Bond ETF	Intrm-Term IG	BOND
Vanguard Value ETF	Large Cap Value	VTV
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM
WisdomTree Yield Enhanced US Aggt Bd ETF	Intrm-Term IG	AGGY
Index Performance		

index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Portfolio Characteristics³

Standard Deviation	6.35%
Sharpe Ratio	0.34
Portfolio Yield	3.64%
Number of Securities	26308
Effective Duration	6.38
Weighted Average Fund Expense	0.37%
Weighted Average Credit Rating	Aa2/AA-

Sector Breakdown

Sector Dieakuowii	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5 31 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and Exchange3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 30 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 30 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 30% equity exposure and 70% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein





GLOBAL 40 TAX-SENSITIVE

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 40 Tax-Sensitive Portfolio is designed for moderately conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 40% / 60% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 40% MSCI All-Country World Index ("ACWI") and 60% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a low-to-moderate risk tolerance who can handle some short-term account volatility and have an investment time horizon of at least three years.

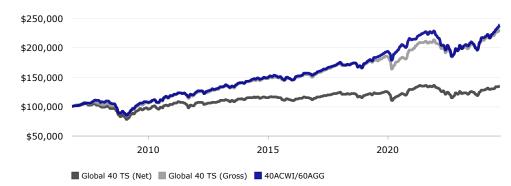
Risk Rating: Moderate Allocation



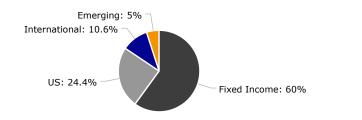
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 40 TS (Net)	3.61%	5.55%	11.54%	0.55%	2.02%	1.75%	1.69%
Global 40 TS (Gross)	4.37%	7.91%	14.89%	3.60%	5.11%	4.84%	4.78%
40ACWI/60AGG	5.77%	9.99%	19.35%	2.36%	5.13%	5.00%	4.99%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Ronofite

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

Global 40 TS (Net)	Global 40 TS (Gross)	40ACWI/60AGG
5.55	7.91	9.99
6.27	9.48	11.66
-11.13	-8.40	-14.94
5.55	8.74	6.19
2.33	5.44	11.72
9.33	12.63	15.84
-6.86	-4.01	-3.63
8.58	11.86	11.33
1.48	4.56	4.88
-3.09	-0.13	-0.35
1.96	5.06	5.33
	(Net) 5.55 6.27 -11.13 5.55 2.33 9.33 -6.86 8.58 1.48 -3.09	(Net) (Gross) 5.55 7.91 6.27 9.48 -11.13 -8.40 5.55 8.74 2.33 5.44 9.33 12.63 -6.86 -4.01 8.58 11.86 1.48 4.56 -3.09 -0.13





GLOBAL 40 TAX-SENSITIVE

As of 09/30/2024

0.00%

Portfo	lio Ho	ldings*
---------------	--------	---------

Name	Asset Class	Symbol	Holdings
Vanguard Value ETF	Large Cap Value	VTV	345
Dimensional US High Profitability ETF	Large Cap Blend	DUHP	181
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE	80
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM	544
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV	979
Dimensional International Core Eq 2 ETF	Developed Large	DFIC	4110
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU	369
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE	5834
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV	2818
JPMorgan Ultra-Short Municipal Inc ETF	Ultra-Short Muni	JMST	2703
JPMorgan Municipal ETF	Intrm-Term Muni	JMUB	861
First Trust Managed Municipal ETF	Intrm-Term Muni	FMB	1354
Xtrackers Municipal Infras Rev Bd ETF	Long-Term Muni	RVNU	336
Dimensional US Equity Market ETF	Large Cap Blend	DFUS	2513
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC	1248
Avantis International Small Cp Eq ETF	Developed Large	AVDS	2668

Portfolio Characteristics³

Standard Deviation	7.38%
Sharpe Ratio	0.26
Portfolio Yield	2.74%
Number of Securities	26641
Effective Duration	6.35
Weighted Average Fund Expense	0.26%
Weighted Average Credit Rating	Aa3/AA-
Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

Other

AAA	57.44 %
BBB	0.00 %
BB	0.00 %
В	0.10 %
CCC	0.00 %
Others	42.46 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolios)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 40 - Tax Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 40 - Tax Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 40% equity exposure and 60% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of less.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





GIOBAL 40

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 40 Portfolio is designed for moderately conservative investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 40% / 60% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 40% MSCI All-Country World Index ("ACWI") and 60% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a low-to-moderate risk tolerance who can handle some short-term account volatility and have an investment time horizon of at least three years.

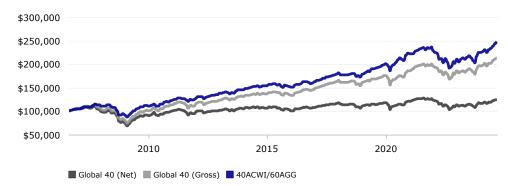
Risk Rating: Moderate Allocation



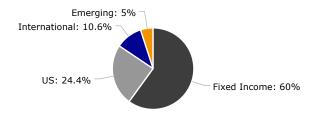
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 40 (Net)	5.11%	6.42%	13.41%	-0.08%	1.65%	1.62%	1.24%
Global 40 (Gross)	5.88%	8.80%	16.80%	2.95%	4.73%	4.70%	4.31%
40ACWI/60AGG	5.77%	9.99%	19.35%	2.36%	5.13%	5.00%	5.16%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Ronofite

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

Global 40 (Net)	Global 40 (Gross)	40ACWI/60AGG
6.42	8.80	9.99
7.09	10.33	11.66
-13.88	-11.22	-14.94
4.63	7.80	6.19
2.83	5.95	11.72
10.76	14.10	15.84
-8.23	-5.42	-3.63
8.49	11.77	11.33
4.05	7.20	4.88
-3.62	-0.68	-0.35
0.46	3.52	5.33
	(Net) 6.42 7.09 -13.88 4.63 2.83 10.76 -8.23 8.49 4.05 -3.62	(Net) (Gross) 6.42 8.80 7.09 10.33 -13.88 -11.22 4.63 7.80 2.83 5.95 10.76 14.10 -8.23 -5.42 8.49 11.77 4.05 7.20 -3.62 -0.68





Symbol

Holdings

2668 1248

5834

2818

4110

Accet Clace

GLOBAL 40

As of 09/30/2024

Portfolio Holdings*

Name	Asset Class	Symbol
Avantis International Small Cp Eq ETF	Developed Large	AVDS
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV
Dimensional International Core Eq 2 ETF	Developed Large	DFIC
Dimensional US Equity Market ETF	Large Cap Blend	DFUS
Dimensional US High Profitability ETF	Large Cap Blend	DUHP
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV
Invesco Taxable Municipal Bond ETF	Taxable Muni	BAB
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE
PIMCO Active Bond ETF	Intrm-Term IG	BOND
Vanguard Value ETF	Large Cap Value	VTV
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM
WisdomTree Yield Enhanced US Aggt Bd ETF	Intrm-Term IG	AGGY
Index Performance		

Portfolio Characteristics³

Standard Deviation	8.87%
Sharpe Ratio	0.18
Portfolio Yield	3.42%
Number of Securities	26308
Effective Duration	6.38
Weighted Average Fund Expense	0.35%
Weighted Average Credit Rating	Aa2/AA-
Sector Breakdown	

Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5 31 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and Exchange3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 40 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 40 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 40% equity exposure and 60% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein





GLOBAL 50 TAX-SENSITIVE

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 50 Tax-Sensitive Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 50% / 50% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 50% MSCI All-Country World Index ("ACWI") and 50% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least five years.

Risk Rating: Balanced Allocation



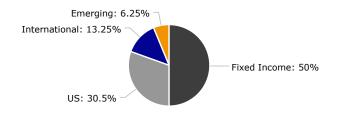
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 50 TS (Net)	4.37%	6.40%	14.50%	2.80%	4.84%	3.99%	5.13%
Global 50 TS (Gross)	5.13%	8.78%	17.44%	4.58%	6.44%	5.43%	6.64%
50ACWI/50AGG	5.91%	11.40%	21.35%	3.33%	6.34%	5.77%	6.87%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Renefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

Global 50 TS (Net)	Global 50 TS (Gross)	50ACWI/50AGG
6.40	8.78	11.40
9.54	10.96	13.38
-9.58	-8.37	-15.47
9.96	11.35	8.18
5.10	6.36	12.64
12.52	13.91	17.63
-6.26	-5.33	-4.56
11.46	12.70	13.35
3.69	5.24	5.41
-2.40	-1.04	-0.64
3.39	4.93	5.15
	(Net) 6.40 9.54 -9.58 9.96 5.10 12.52 -6.26 11.46 3.69 -2.40	(Net) (Gross) 6.40 8.78 9.54 10.96 -9.58 -8.37 9.96 11.35 5.10 6.36 12.52 13.91 -6.26 -5.33 11.46 12.70 3.69 5.24 -2.40 -1.04





GLOBAL 50 TAX-SENSITIVE

As of 09/30/2024

0.00%

Portfol	io Ho	ldina	ıs*
----------------	-------	-------	-----

Name	Asset Class	Symbol	Holdings
Vanguard Value ETF	Large Cap Value	VTV	345
Dimensional US High Profitability ETF	Large Cap Blend	DUHP	181
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE	80
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM	544
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV	979
Dimensional International Core Eq 2 ETF	Developed Large	DFIC	4110
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU	369
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE	5834
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV	2818
JPMorgan Ultra-Short Municipal Inc ETF	Ultra-Short Muni	JMST	2703
JPMorgan Municipal ETF	Intrm-Term Muni	JMUB	861
First Trust Managed Municipal ETF	Intrm-Term Muni	FMB	1354
Xtrackers Municipal Infras Rev Bd ETF	Long-Term Muni	RVNU	336
Dimensional US Equity Market ETF	Large Cap Blend	DFUS	2513
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC	1248
Avantis International Small Cp Eq ETF	Developed Large	AVDS	2668

Portfolio Characteristics³

Standard Deviation	8.24%
Sharpe Ratio	0.65
Portfolio Yield	2.63%
Number of Securities	22914
Effective Duration	6.35
Weighted Average Fund Expense	0.26%
Weighted Average Credit Rating	Aa3/AA-
Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

Other

AAA	57.44 %
BBB	0.00 %
BB	0.00 %
В	0.10 %
CCC	0.00 %
Others	42.46 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolios)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 50 - Tax Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 50 - Tax Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 50% equity exposure and 50% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of less.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





As of 09/30/2024

Investment Objective and Strategy

The 3D Global 50 Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 50% / 50% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 50% MSCI All-Country World Index ("ACWI") and 50% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least five years.

Risk Rating: Balanced Allocation



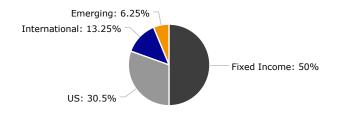
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 50 (Net)	5.51%	7.43%	15.37%	0.66%	2.28%	2.02%	3.24%
Global 50 (Gross)	6.29%	9.84%	18.82%	3.72%	5.39%	5.12%	6.37%
50ACWI/50AGG	5.91%	11.40%	21.35%	3.33%	6.34%	5.77%	7.13%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 50 (Net)	Global 50 (Gross)	50ACWI/50AG
2024	7.43	9.84	11.40
2023	8.17	11.44	13.38
2022	-14.19	-11.55	-15.47
2021	6.31	9.53	8.18
2020	1.98	5.08	12.64
2019	11.89	15.27	17.63
2018	-9.43	-6.65	-4.56
2017	10.66	14.00	13.35
2016	4.79	7.97	5.41
2015	-4.71	-1.80	-0.64
2014	1.05	4.12	5.15





As of 09/30/2024

Portfolio Holdings*

Name	Asset Class	Symbol	Holdings
Avantis International Small Cp Eq ETF	Developed Large	AVDS	2668
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC	1248
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE	5834
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV	2818
Dimensional International Core Eq 2 ETF	Developed Large	DFIC	4110
Dimensional US Equity Market ETF	Large Cap Blend	DFUS	2513
Dimensional US High Profitability ETF	Large Cap Blend	DUHP	181
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV	979
Invesco Taxable Municipal Bond ETF	Taxable Muni	BAB	639
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU	369
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE	80
PIMCO Active Bond ETF	Intrm-Term IG	BOND	1248
Vanguard Value ETF	Large Cap Value	VTV	345
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM	544
WisdomTree Yield Enhanced US Aggt Bd ETF	Intrm-Term IG	AGGY	2692
Index Performance			

Portfolio Characteristics³ Si

Sactor Proakdown	
Weighted Average Credit Rating	Aa2/AA-
Weighted Average Fund Expense	0.34%
Effective Duration	6.38
Number of Securities	27153
Portfolio Yield	3.20%
Sharpe Ratio	0.40
Standard Deviation	9.12%

18.29%
16.15%
15.55%
10.92%
10.66%
7.03%
6.13%
6.01%
4.21%
3.00%
2.04%
0.00%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5.31 %

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and Exchange3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 50 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 50 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 50% equity exposure and 50% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein





GLOBAL 60 TAX-SENSITIVE

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 60 Tax-Sensitive Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 60% / 40% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 60% MSCI All-Country World Index ("ACWI") and 40% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least 7-10 years.

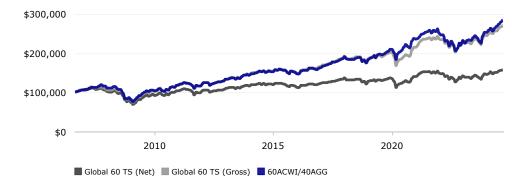
Risk Rating: Balanced Allocation



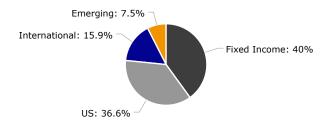
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 60 TS (Net)	4.90%	7.75%	15.45%	1.91%	3.74%	2.91%	2.58%
Global 60 TS (Gross)	5.67%	10.16%	18.91%	5.00%	6.89%	6.03%	5.70%
60ACWI/40AGG	6.05%	12.83%	23.38%	4.30%	7.53%	6.53%	5.99%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

3D Risk-Based Portfolios may offer significant diversification benefits. lower investment costs. greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

Global 60 TS (Net)	Global 60 TS (Gross)	60ACWI/40AGG
7.75	10.16	12.83
8.73	12.01	15.11
-12.48	-9.79	-16.02
10.31	13.64	10.20
2.14	5.25	13.49
12.42	15.81	19.42
-9.11	-6.32	-5.51
10.50	13.83	15.41
4.88	8.06	5.92
-4.46	-1.54	-0.95
2.21	5.31	4.97
	(Net) 7.75 8.73 -12.48 10.31 2.14 12.42 -9.11 10.50 4.88 -4.46	(Net) (Gross) 7.75 10.16 8.73 12.01 -12.48 -9.79 10.31 13.64 2.14 5.25 12.42 15.81 -9.11 -6.32 10.50 13.83 4.88 8.06 -4.46 -1.54





Symbol

Holdings

Accet Clace

GLOBAL 60 TAX-SENSITIVE

Portfolio Characteristics³

Standard Deviation

As of 09/30/2024

0.00%

0.10%

0.00%

42.46%

10.35%

Portfolio Holdings*	Poi	rtfo	olio	Ho	ld	ind	ıs*
---------------------	-----	------	------	----	----	-----	-----

Name

Name			Asset Ci	ass	Symbol	Holdings	Standard Deviation	10.55%
Avantis International Small Cp Ed	ETF		Develop	ed Large	AVDS	2668	Sharpe Ratio	0.30
Avantis US Small Cap Equity ETF			Small Ca	p Blend	AVSC	1248	Portfolio Yield	2.52%
Dimensional Emerging Core Equi	ty Mkt ETF		Develop	ed Small	DFAE	5834	Number of Securities	22914
Dimensional Emerging Markets \	/alue ETF		Emergin	g Large	DFEV	2818	Effective Duration	6.35
Dimensional International Core E	a 2 ETF		Develop	ed Large	DFIC	4110	Weighted Average Fund Expense	0.25%
Dimensional US Equity Market E	•		Large Ca	Ü	DFUS	2513	Weighted Average Credit Rating	Aa3/AA-
Dimensional US High Profitability			Large Ca		DUHP	181	Sector Breakdown	
Dimensional US Small Cap Value	,		Small Ca		DFSV	979	Financials	18.29%
First Trust Managed Municipal E				erm Muni	FMB	1354	Technology	16.15%
iShares Edge MSCI Intl Value Fac				ed Large	IVLU	369	Industrials	15.55%
9	LOI ETF			erm Muni		861	Health Care	10.92%
JPMorgan Municipal ETF					JMUB		Consumer Discretionary	10.66%
JPMorgan Ultra-Short Municipal				ort Muni	JMST	2703	Consumer Staples	7.03%
KraneShares Value Line® Dyn Di	v Eq ETF		Large Ca	•	KVLE	80	Materials	6.13%
Vanguard Value ETF			Large Ca		VTV	345	Energy	6.01%
WisdomTree U.S. MidCap Earning	gs ETF		Mid Cap	Blend	EZM	544	Communication Services	4.21%
Xtrackers Municipal Infras Rev Bo	d ETF		Long-Ter	rm Muni	RVNU	336	Utilities	3.00%
Index Performance							Real Estate	2.04%
illuex Performance	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	Other	0.00%
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%	Credit Pating	
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%	Credit Rating	57.440/
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%	AAA	57.44 %
1.13CI/CVVIIICI O3D	0.0170	10.0070	01.7 770	0.0770	12.17/0	17.2070	BBB	0.00 %

Disclaimer

MSCI EAFE

MSCI Emerging Markets

Bloomberg US Agg. Bond

7.25%

7.79%

5.20%

12.99%

14.37%

4.46%

24.76%

22.90%

11.58%

5.48%

-2.24%

-1.57%

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolios ("5D Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

8.19%

3.18%

0.22%

17.51%

18.41%

6.22%

RR

В

CCC

Others

¹Performance The 3D Global 60 - Tax Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 60 - Tax Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 60% equity exposure and 40% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

² **Growth of \$100,000** shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





As of 09/30/2024

Investment Objective and Strategy

The 3D Global 60 Portfolio is designed for moderate investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 60% / 40% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 60% MSCI All-Country World Index ("ACWI") and 40% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a moderate risk tolerance who are willing to accept more short-term account volatility to achieve higher returns, while not being too aggressive, and they have an investment time horizon of at least 7-10 years.

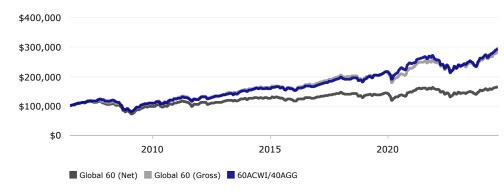
Risk Rating: Balanced Allocation



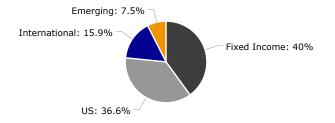
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 60 (Net)	5.25%	8.36%	15.98%	1.74%	3.60%	2.82%	2.76%
Global 60 (Gross)	6.02%	10.79%	19.44%	4.82%	6.74%	5.94%	5.88%
60ACWI/40AGG	6.05%	12.83%	23.38%	4.30%	7.53%	6.53%	6.12%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 60 (Net)	Global 60 (Gross)	60ACWI/40AG
2024	8.36	10.79	12.83
2023	8.92	12.21	15.11
2022	-13.47	-10.80	-16.02
2021	9.52	12.82	10.20
2020	2.29	5.40	13.49
2019	12.77	16.17	19.42
2018	-10.23	-7.48	-5.51
2017	11.83	15.20	15.41
2016	5.35	8.54	5.92
2015	-4.14	-1.21	-0.95
2014	1.36	4.44	4.97





Holdings

2668

1248

5834

2818

4110

2513

181

979

639

369

80

1248

345

544

2692

GLOBAL 60

As of 09/30/2024

Portfolio Holdings*

Name	Asset Class	Symbol
Avantis International Small Cp Eq ETF	Developed Large	AVDS
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV
Dimensional International Core Eq 2 ETF	Developed Large	DFIC
Dimensional US Equity Market ETF	Large Cap Blend	DFUS
Dimensional US High Profitability ETF	Large Cap Blend	DUHP
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV
Invesco Taxable Municipal Bond ETF	Taxable Muni	BAB
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE
PIMCO Active Bond ETF	Intrm-Term IG	BOND
Vanguard Value ETF	Large Cap Value	VTV
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM
WisdomTree Yield Enhanced US Aggt Bd ETF	Intrm-Term IG	AGGY
Index Performance		

Portfolio Characteristics³

Standard Deviation	10.52%
Sharpe Ratio	0.31
Portfolio Yield	2.98%
Number of Securities	27153
Effective Duration	6.38
Weighted Average Fund Expense	0.32%
Weighted Average Credit Rating	Aa2/AA-
Sector Breakdown	

Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5.31%

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 60 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 60 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 60% equity exposure and 40% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein





GLOBAL 70 TAX-SENSITIVE

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 70 Tax-Sensitive Portfolio is designed for moderately aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 70% / 30% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 70% MSCI All-Country World Index ("ACWI") and 30% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate-to-aggressive risk tolerance who can handle more short-term account volatility because they want to achieve higher returns and have an investment time horizon of at least ten years.

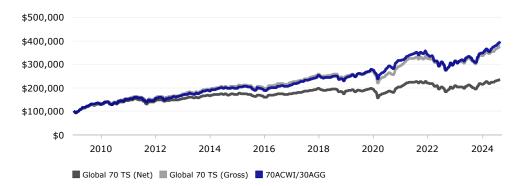
Risk Rating: Moderate-Aggressive Allocation



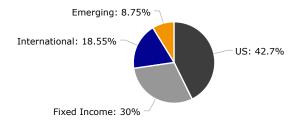
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 70 TS (Net)	5.40%	8.86%	17.48%	2.35%	4.58%	3.43%	5.60%
Global 70 TS (Gross)	6.18%	11.29%	20.98%	5.46%	7.75%	6.56%	8.80%
70ACWI/30AGG	6.19%	14.26%	25.43%	5.25%	8.71%	7.27%	9.16%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Ranafite

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 70 TS (Net)	Global 70 TS (Gross)	70ACWI/30AGG
2024	8.86	11.29	14.26
2023	9.70	13.01	16.86
2022	-13.29	-10.62	-16.58
2021	11.72	15.08	12.25
2020	3.05	6.18	14.28
2019	13.54	16.96	21.21
2018	-9.83	-7.07	-6.47
2017	11.68	15.04	17.50
2016	4.80	7.98	6.43
2015	-4.12	-1.20	-1.28
2014	2.64	5.76	4.77





GLOBAL 70 TAX-SENSITIVE

Portfolio Characteristics³

As of 09/30/2024

0.00%

0.00%

0.10%

0.00%

42.46%

Portfolio Hold	inas*
----------------	-------

Name			Asset Cla	ass	Symbol	Holdings	Standard Deviation	10.93%
Avantis International Small Cp Eq I	ETF		Develop	ed Large	AVDS	2668	Sharpe Ratio	0.55
Avantis US Small Cap Equity ETF			Small Ca	p Blend	AVSC	1248	Portfolio Yield	2.41%
Dimensional Emerging Core Equity	/ Mkt ETF		Develop	ed Small	DFAE	5834	Number of Securities	22914
Dimensional Emerging Markets Va	lue ETF		Emergin	g Large	DFEV	2818	Effective Duration	6.35
Dimensional International Core Eq			Develop	•	DFIC	4110	Weighted Average Fund Expense	0.25%
Dimensional US Equity Market ETI			Large Ca	Ü	DFUS	2513	Weighted Average Credit Rating	Aa3/AA-
Dimensional US High Profitability			Large Ca	•	DUHP	181	Sector Breakdown	
Dimensional US Small Cap Value E	TF		Small Ca	p Blend	DFSV	979	Financials	18.29%
First Trust Managed Municipal ETF	=		Intrm-Te	rm Muni	FMB	1354	Technology	16.15%
iShares Edge MSCI Intl Value Facto			Develop		IVLU	369	Industrials	15.55%
JPMorgan Municipal ETF			Intrm-Te	Ü	JMUB	861	Health Care	10.92%
JPMorgan Ultra-Short Municipal In	nc ETE		Ultra-Sh		JMST	2703	Consumer Discretionary	10.66%
KraneShares Value Line® Dyn Div			Large Ca		KVLE	80	Consumer Staples	7.03%
,	EYEIF		Ü	•	VTV	345	Materials	6.13%
Vanguard Value ETF			Large Ca	•			Energy	6.01%
WisdomTree U.S. MidCap Earnings			Mid Cap		EZM	544	Communication Services	4.21%
Xtrackers Municipal Infras Rev Bd	ETF		Long-Ter	m Muni	RVNU	336	Utilities	3.00%
Index Performance							Real Estate	2.04%
muck i cironnance	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	Other	0.00%
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%	Credit Rating	
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%	AAA	57.44 %

Disclaimer

MSCI EAFE

MSCI ACWI Net USD

MSCI Emerging Markets

Bloomberg US Agg. Bond

6.61%

7.25%

7.79%

5.20%

18.66%

12.99%

14.37%

4.46%

31.74%

24.76%

22.90%

11.58%

8.09%

5.48%

-2.24%

-1.57%

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolios ("5D Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

12.19%

8.19%

3.18%

0.22%

17.23%

17.51%

18.41%

6.22%

BBB

RR

В

CCC

Others

1 Performance The 3D Global 70 - Tax Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 70 - Tax Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 70% Equity exposure and 30% Fixed Income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's olalitity based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





As of 09/30/2024

Investment Objective and Strategy

The 3D Global 70 Portfolio is designed for moderately aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 70% / 30% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 70% MSCI All-Country World Index ("ACWI") and 30% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a moderate-to-aggressive risk tolerance who can handle more short-term account volatility because they want to achieve higher returns and have an investment time horizon of at least ten years.

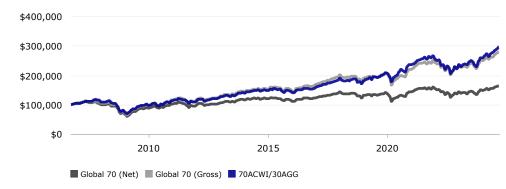
Risk Rating: Moderate-Aggressive Allocation



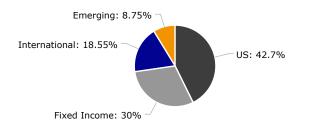
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 70 (Net)	6.08%	9.25%	18.20%	2.32%	4.16%	3.28%	2.79%
Global 70 (Gross)	6.86%	11.69%	21.72%	5.43%	7.32%	6.42%	5.91%
70ACWI/30AGG	6.19%	14.26%	25.43%	5.25%	8.71%	7.27%	6.24%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 70 (Net)	Global 70 (Gross)	70ACWI/30AGG
2024	9.25	11.69	14.26
2023	9.99	13.31	16.86
2022	-13.99	-11.33	-16.58
2021	10.53	13.87	12.25
2020	2.17	5.28	14.28
2019	13.81	17.23	21.21
2018	-11.28	-8.55	-6.47
2017	14.07	17.51	17.50
2016	5.80	9.01	6.43
2015	-4.39	-1.47	-1.28
2014	2.08	5.18	4.77





Holdings

2668 1248

5834

2818

4110

GLOBAL 70

As of 09/30/2024

Portfolio Holdings*

Name		Asset Class	Symbol	
Avantis International Sma	all Cp Eq ETF	Developed Large	AVDS	
Avantis US Small Cap Equ	ity ETF	Small Cap Blend	AVSC	
Dimensional Emerging Co	ore Equity Mkt ETF	Developed Small	DFAE	
Dimensional Emerging M	arkets Value ETF	Emerging Large	DFEV	
Dimensional Internationa	l Core Eq 2 ETF	Developed Large	DFIC	
Dimensional US Equity M	arket ETF	Large Cap Blend	DFUS	
Dimensional US High Pro	fitability ETF	Large Cap Blend	DUHP	
Dimensional US Small Cap	o Value ETF	Small Cap Blend	DFSV	
Invesco Taxable Municipa	l Bond ETF	Taxable Muni	BAB	
iShares Edge MSCI Intl Va	lue Factor ETF	Developed Large	IVLU	
KraneShares Value Line®	Dyn Div Eq ETF	Large Cap Blend	KVLE	
PIMCO Active Bond ETF		Intrm-Term IG	BOND	
Vanguard Value ETF		Large Cap Value	VTV	
WisdomTree U.S. MidCap	Earnings ETF	Mid Cap Blend	EZM	
WisdomTree Yield Enhan	ced US Aggt Bd ETF	Intrm-Term IG	AGGY	
Index Performance				

Portfolio Characteristics³

Contar Proakdown	
Weighted Average Credit Rating	Aa2/AA-
Weighted Average Fund Expense	0.30%
Effective Duration	6.38
Number of Securities	27153
Portfolio Yield	2.75%
Sharpe Ratio	0.29
Standard Deviation	12.32%

Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5.31%

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 70 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 70 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 70% Equity exposure and 30% Fixed Income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein





GLOBAL 80 TAX-SENSITIVE

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 80 Tax-Sensitive Portfolio is designed for moderately aggessive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 80% / 20% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 80% MSCI All-Country World Index ("ACWI") and 20% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with a moderate-to-aggressive risk tolerance who can handle more short-term account volatility because they want to achieve higher returns and have an investment time horizon of at least ten years.

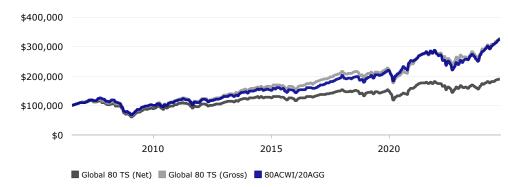
Risk Rating: Moderate-Aggressive Allocation



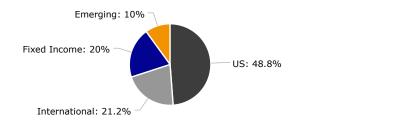
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 80 TS (Net)	5.81%	9.86%	19.07%	3.21%	5.69%	4.36%	3.62%
Global 80 TS (Gross)	6.58%	12.32%	22.62%	6.34%	8.89%	7.53%	6.76%
80ACWI/20AGG	6.33%	15.72%	27.51%	6.21%	9.88%	7.99%	6.76%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Ranafite

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

Global 80 TS (Net)	Global 80 TS (Gross)	80ACWI/20AGG
9.86	12.32	15.72
10.84	14.19	18.62
-13.76	-11.10	-17.15
15.71	19.19	14.32
2.81	5.94	15.00
15.56	19.04	23.01
-11.56	-8.84	-7.44
13.11	16.51	19.62
8.02	11.29	6.92
-4.40	-1.48	-1.62
3.23	6.36	4.58
	(Net) 9.86 10.84 -13.76 15.71 2.81 15.56 -11.56 13.11 8.02 -4.40	(Net) (Gross) 9.86 12.32 10.84 14.19 -13.76 -11.10 15.71 19.19 2.81 5.94 15.56 19.04 -11.56 -8.84 13.11 16.51 8.02 11.29 -4.40 -1.48





GLOBAL 80 TAX-SENSITIVE

Portfolio Characteristics³

As of 09/30/2024

0.00%

0.10%

0.00%

42.46%

	Porti	oli	o F	lob	di	n	1 5*
--	-------	-----	-----	-----	----	---	-------------

Name			Asset CI	ass	Symbol	Holdings	Standard Deviation	13.55%
Avantis International Small Cp I	eq ETF		Develop	ed Large	AVDS	2668	Sharpe Ratio	0.33
Avantis US Small Cap Equity ET	F		Small Ca	p Blend	AVSC	1248	Portfolio Yield	2.31%
Dimensional Emerging Core Equ	uity Mkt ETF		Develop	ed Small	DFAE	5834	Number of Securities	22914
Dimensional Emerging Markets	Value ETF		Emergin	g Large	DFEV	2818	Effective Duration	6.35
Dimensional International Core			•	ed Large	DFIC	4110	Weighted Average Fund Expense	0.25%
Dimensional US Equity Market	•		Large Ca	Ü	DFUS	2513	Weighted Average Credit Rating	Aa3/AA-
Dimensional US High Profitabili			Large Ca		DUHP	181	Sector Breakdown	
Dimensional US Small Cap Value	•		Small Ca	•	DFSV	979	Financials	18.29%
First Trust Managed Municipal I				erm Muni	FMB	1354	Technology	16.15%
iShares Edge MSCI Intl Value Fa				ed Large	IVLU	369	Industrials	15.55%
JPMorgan Municipal ETF	ictor ETT		·	erm Muni	JMUB	861	Health Care	10.92%
JPMorgan Ultra-Short Municipa	l Inc ETF			ort Muni	JMST	2703	Consumer Discretionary	10.66%
							Consumer Staples	7.03%
KraneShares Value Line® Dyn [DIV Eq ETF		Large Ca	•	KVLE	80	Materials	6.13%
Vanguard Value ETF			Large Ca	•	VTV	345	Energy	6.01%
WisdomTree U.S. MidCap Earni	ngs ETF		Mid Cap	Blend	EZM	544	Communication Services	4.21%
Xtrackers Municipal Infras Rev I	Bd ETF		Long-Ter	rm Muni	RVNU	336	Utilities	3.00%
Index Performance							Real Estate	2.04%
macx i criormanoc	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	Other	0.00%
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%	Credit Rating	
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%	AAA	57.44%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%	BBB	0.00 %

Disclaimer

MSCI EAFE

MSCI Emerging Markets

Bloomberg US Agg. Bond

7.25%

7.79%

5.20%

12.99%

14.37%

4.46%

24.76%

22.90%

11.58%

5.48%

-2.24%

-1.57%

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

8.19%

3.18%

0.22%

17.51%

18.41%

6.22%

RR

В

CCC

Others

1 Performance The 3D Global 80 - Tax Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 80 - Tax Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 80% equity exposure and 20% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights @freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





As of 09/30/2024

Investment Objective and Strategy

The 3D Global 80 Portfolio is designed for moderately aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 80% / 20% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 80% MSCI All-Country World Index ("ACWI") and 20% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with a moderate-to-aggressive risk tolerance who can handle more short-term account volatility because they want to achieve higher returns and have an investment time horizon of at least ten years.

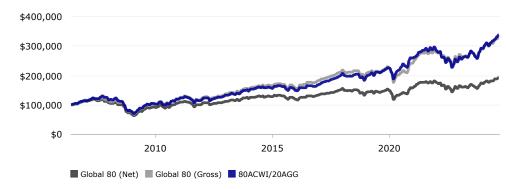
Risk Rating: Moderate-Aggressive Allocation



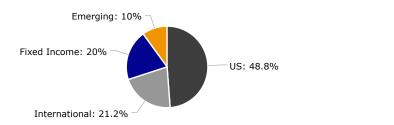
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 80 (Net)	5.96%	10.30%	19.56%	3.44%	5.82%	4.28%	3.61%
Global 80 (Gross)	6.74%	12.76%	23.13%	6.57%	9.02%	7.45%	6.75%
80ACWI/20AGG	6.33%	15.72%	27.51%	6.21%	9.88%	7.99%	6.88%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 80 (Net)	Global 80 (Gross)	80ACWI/20AGG
2024	10.30	12.76	15.72
2023	11.15	14.51	18.62
2022	-13.78	-11.12	-17.15
2021	15.70	19.18	14.32
2020	2.61	5.73	15.00
2019	15.46	18.93	23.01
2018	-11.93	-9.23	-7.44
2017	14.22	17.65	19.62
2016	7.23	10.47	6.92
2015	-4.39	-1.47	-1.62
2014	2.68	5.79	4.58





Holdings

2668 1248 5834

2818

4110

GLOBAL 80

As of 09/30/2024

Portfolio Holdings*

60 B 500 TB	F 000/	00.400/	04.0004	44.000/	45.000/
	3 mo	YTD	1 Year	3 Year	5 Year
Index Performance					
WisdomTree Yield Enhanced US Ag	gt Bd ETF		Intrm-Te	erm IG	AGGY
WisdomTree U.S. MidCap Earnings	ETF		Mid Cap	Blend	EZM
Vanguard Value ETF		Large Cap Value		ap Value	VTV
PIMCO Active Bond ETF	Active Bond ETF Intrm-Term IG		erm IG	BOND	
KraneShares Value Line® Dyn Div E	Large C	ap Blend	KVLE		
iShares Edge MSCI Intl Value Factor	r ETF		Develop	oed Large	IVLU
Invesco Taxable Municipal Bond ETF	F		Taxable	Muni	BAB
Dimensional US Small Cap Value ET	F		Small Ca	ap Blend	DFSV
Dimensional US High Profitability E	Dimensional US High Profitability ETF Large Cap BI				
Dimensional US Equity Market ETF			Large C	ap Blend	DFUS
Dimensional International Core Eq.2	2 ETF		Develop	oed Large	DFIC
Dimensional Emerging Markets Valu	ue ETF		Emergir	ng Large	DFEV
Dimensional Emerging Core Equity	Mkt ETF		Develop	oed Small	DFAE
Avantis US Small Cap Equity ETF	Small Ca	ap Blend	AVSC		
Avantis International Small Cp Eq E	vantis International Small Cp Eq ETF Develo				
Name	Asset C	Symbol			

Portfolio Characteristics³

Standard Deviation	13.36%
Sharpe Ratio	0.33
Portfolio Yield	2.53%
Number of Securities	27153
Effective Duration	6.38
Weighted Average Fund Expense	0.28%
Weighted Average Credit Rating	Aa2/AA-
Cootor Prockdown	

Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5 31 %

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and Exchange3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 80 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 80 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 80% equity exposure and 20% fixed income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





GLOBAL 90 TAX-SENSITIVE

As of 09/30/2024

Investment Objective and Strategy

The 3D Global 90 Tax-Sensitive Portfolio is designed for aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 90% / 10% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 90% MSCI All-Country World Index ("ACWI") and 10% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy provides exposure to tax-sensitive fixed income sectors such as U.S. municipal bonds.

Investor Profile

Designed for investors with the highest risk tolerance who want to maximize their return potential and can handle high short-term account volatility and have an investment time horizon over ten years.

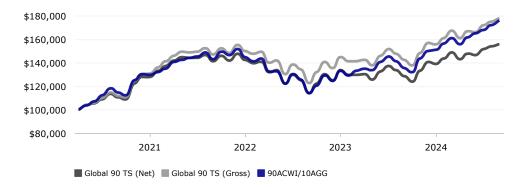
Risk Rating: Aggressive Allocation



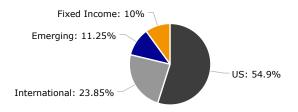
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 90 TS (Net)	6.31%	10.93%	21.03%	3.34%	-	-	10.57%
Global 90 TS (Gross)	7.09%	13.40%	24.64%	6.47%	-	-	13.90%
90ACWI/10AGG	6.47%	17.18%	29.61%	7.15%	-	_	13.63%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Ronofite

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 90 TS (Net)	Global 90 TS (Gross)	90ACWI/10AGG
2024	10.93	13.40	17.18
2023	12.38	15.77	20.40
2022	-15.33	-12.72	-17.75
2021	15.39	18.85	16.42
2020	27.97	30.47	30.16





GLOBAL 90 TAX-SENSITIVE

Portfolio Characteristics³

RR

В

CCC

Others

As of 09/30/2024

0.00%

0.10%

0.00%

42.46%

Portfo	lio He	oldin	as*
--------	--------	-------	-----

Name			Asset Cla	ass	Symbol	Holdings	Standard Deviation	14.50%
Avantis International Small Cp Eq ETF			Develop	ed Large	AVDS	2668	Sharpe Ratio	0.77
Avantis US Small Cap Equity ETF			Small Ca	p Blend	AVSC	1248	Portfolio Yield	2.20%
Dimensional Emerging Core Equity Mkt	t ETF		Develop	ed Small	DFAE	5834	Number of Securities	22914
Dimensional Emerging Markets Value E	TF		Emergin	g Large	DFEV	2818	Effective Duration	6.35
Dimensional International Core Eq 2 ET	ΓF		Develop	ed Large	DFIC	4110	Weighted Average Fund Expense	0.25%
Dimensional US Equity Market ETF			Large Ca	•	DFUS	2513	Weighted Average Credit Rating	Aa3/AA-
Dimensional US High Profitability ETF			Large Ca		DUHP	181	Sector Breakdown	
Dimensional US Small Cap Value ETF			Small Ca		DFSV	979	Financials	18.29%
First Trust Managed Municipal ETF			Intrm-Te		FMB	1354	Technology	16.15%
iShares Edge MSCI Intl Value Factor ET	F		Develop		IVLU	369	Industrials	15.55%
JPMorgan Municipal ETF	•		Intrm-Te	Ü	JMUB	861	Health Care	10.92%
JPMorgan Ultra-Short Municipal Inc ET	re			ort Muni	JMST	2703	Consumer Discretionary	10.66%
KraneShares Value Line® Dyn Div Eq E			Large Ca		KVLE	80	Consumer Staples	7.03%
	ır		Ü			345	Materials	6.13%
Vanguard Value ETF			Large Ca	•	VTV		Energy	6.01%
WisdomTree U.S. MidCap Earnings ETF	•		Mid Cap		EZM	544	Communication Services	4.21%
Xtrackers Municipal Infras Rev Bd ETF			Long-Ter	m Muni	RVNU	336	Utilities	3.00%
Index Performance							Real Estate	2.04%
	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev	Other	0.00%
S&P 500 TR 5.0	.90%	22.10%	36.38%	11.92%	15.98%	17.89%	Credit Rating	
Russell 2000 8.	.91%	9.93%	24.83%	0.36%	7.90%	23.76%	AAA	57.44%
MSCI ACWI Net USD 6.6	.61%	18.66%	31.74%	8.09%	12.19%	17.23%	BBB	0.00%

Disclaimer

MSCI EAFE

MSCI Emerging Markets

Bloomberg US Agg. Bond

7.25%

7.79%

5.20%

12.99%

14.37%

4.46%

24.76%

22.90%

11.58%

5.48%

-2.24%

-1.57%

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

8.19%

3.18%

0.22%

17.51%

18.41%

6.22%

1 Performance The 3D Global 90 - Tax Sensitive Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 90 - Tax Sensitive Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 90% Equity exposure and 10% Fixed Income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights @freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.





As of 09/30/2024

Investment Objective and Strategy

The 3D Global 90 Portfolio is designed for aggressive investors looking for a broadly diversified asset allocation investment suited to their tolerance for risk with periodic rebalancing. The Portfolio uses exchange-traded funds (ETFs)† to target 90% / 10% exposures to equities and fixed income, respectively, by broadly diversifying across thousands of companies across global markets. The strategy's investment objective is to provide long-term superior risk-adjusted returns over a blended benchmark consisting of 90% MSCI All-Country World Index ("ACWI") and 10% Bloomberg/Barclays U.S. Aggregate Bond Index ("AGG"). The Portfolio's equity strategy favors stocks with risk characteristics historically rewarded by the market such as small cap, value, quality, momentum, and low volatility, while the Portfolio's fixed income strategy favors sectors that generate superior risk-adjusted income.

Investor Profile

Designed for investors with the highest risk tolerance who want to maximize their return potential and can handle high short-term account volatility and have an investment time horizon over ten years.

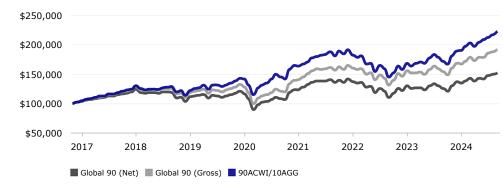
Risk Rating: Aggressive Allocation



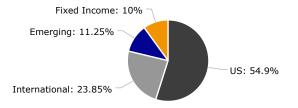
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Global 90 (Net)	6.55%	10.97%	20.76%	3.81%	6.09%	-	5.42%
Global 90 (Gross)	7.33%	13.44%	24.36%	6.96%	9.30%	-	8.61%
90ACWI/10AGG	6.47%	17.18%	29.61%	7.15%	11.04%	-	10.70%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The 3D model portfolio series was launched in 2006 and our data-driven, systematic investment approach has delivered for investors through our core belief that risk will be rewarded over time if diversification is applied. We don't try to time the markets or find "mispriced" stocks; we trust the markets to be efficient. We research to understand and invest in risk factors that historically outperform and we are committed to seeking the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Global 90 (Net)	Global 90 (Gross)	90ACWI/10AGG
2024	10.97	13.44	17.18
2023	11.81	15.18	20.40
2022	-13.97	-11.32	-17.75
2021	14.93	18.38	16.42
2020	2.70	5.82	15.66
2019	16.32	19.81	24.81
2018	-13.55	-10.88	-8.42
2017	17.25	20.77	21.78
2016	1.78	2.03	1.96





GLOBAL 90

As of 09/30/2024

Portfolio Holdings*

Name	Asset Class	Symbol
Avantis International Small Cp Eq ETF	Developed Large	AVDS
Avantis US Small Cap Equity ETF	Small Cap Blend	AVSC
Dimensional Emerging Core Equity Mkt ETF	Developed Small	DFAE
Dimensional Emerging Markets Value ETF	Emerging Large	DFEV
Dimensional International Core Eq 2 ETF	Developed Large	DFIC
Dimensional US Equity Market ETF	Large Cap Blend	DFUS
Dimensional US High Profitability ETF	Large Cap Blend	DUHP
Dimensional US Small Cap Value ETF	Small Cap Blend	DFSV
Invesco Taxable Municipal Bond ETF	Taxable Muni	BAB
iShares Edge MSCI Intl Value Factor ETF	Developed Large	IVLU
KraneShares Value Line® Dyn Div Eq ETF	Large Cap Blend	KVLE
PIMCO Active Bond ETF	Intrm-Term IG	BOND
Vanguard Value ETF	Large Cap Value	VTV
WisdomTree U.S. MidCap Earnings ETF	Mid Cap Blend	EZM
WisdomTree Yield Enhanced US Aggt Bd ETF	Intrm-Term IG	AGGY
Index Performance		

Portfolio Characteristics³

Standard Deviation	14.30%
Sharpe Ratio	0.44
Portfolio Yield	2.31%
Number of Securities	27153
Effective Duration	6.38
Weighted Average Fund Expense	0.27%
Weighted Average Credit Rating	Aa2/AA-

Si

Holdings

2668 1248 5834

2818 4110

Sector Breakdown	
Financials	18.29%
Technology	16.15%
Industrials	15.55%
Health Care	10.92%
Consumer Discretionary	10.66%
Consumer Staples	7.03%
Materials	6.13%
Energy	6.01%
Communication Services	4.21%
Utilities	3.00%
Real Estate	2.04%
Other	0.00%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	5.90%	22.10%	36.38%	11.92%	15.98%	17.89%
Russell 2000	8.91%	9.93%	24.83%	0.36%	7.90%	23.76%
MSCI ACWI Net USD	6.61%	18.66%	31.74%	8.09%	12.19%	17.23%
MSCI EAFE	7.25%	12.99%	24.76%	5.48%	8.19%	17.51%
MSCI Emerging Markets	7.79%	14.37%	22.90%	-2.24%	3.18%	18.41%
Bloomberg US Agg. Bond	5.20%	4.46%	11.58%	-1.57%	0.22%	6.22%

Credit Rating

AAA	77.51%
BBB	13.85 %
BB	1.23 %
В	0.57 %
CCC	1.52 %
Others	5.31%

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and acts as investment advisor to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's and Exchange Commission and Exchange3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹Performance The 3D Global 90 Portfolio Composite includes all discretionary accounts that are managed to the 3D Global 90 Portfolio Strategy which uses exchange-traded funds (ETFs) and/or mutual funds to target 90% Equity exposure and 10% Fixed Income exposure. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²Growth of \$100,000 shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³Portfolio Characteristics may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

*Portfolio Holdings information is as of Sept 30, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein