

Magnetic Marketing in the Age of Access

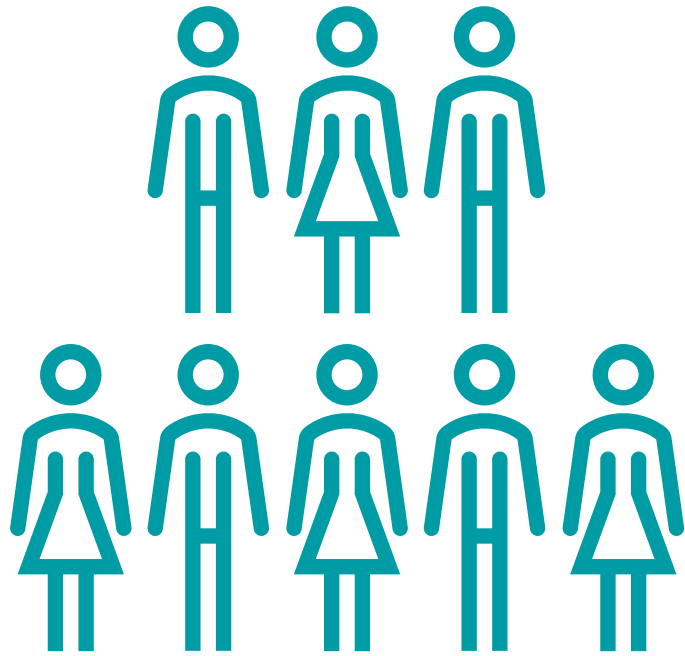
How elite professionals attract, not chase

Jackie Wilke, VP
Advisor Consultant





The Power of Y-O-U



- Multi-generational, family focused
- Subject matter experts within the team
- Your WHY
- Authority, expertise marketing
- All things to some people
- Strategic partners
- Stories, testimonials
- Communities

All things to SOME people



62% of investors willing to pay more for customization*

89% of ultra-high-net-worth individuals prefer receiving value-add services from a single source**

[80 percent of affluent households would rather pay for human advice vs. a customized digital advice service***

*Fidelity Investments study Wealth management in motion: Exploring levels of growth

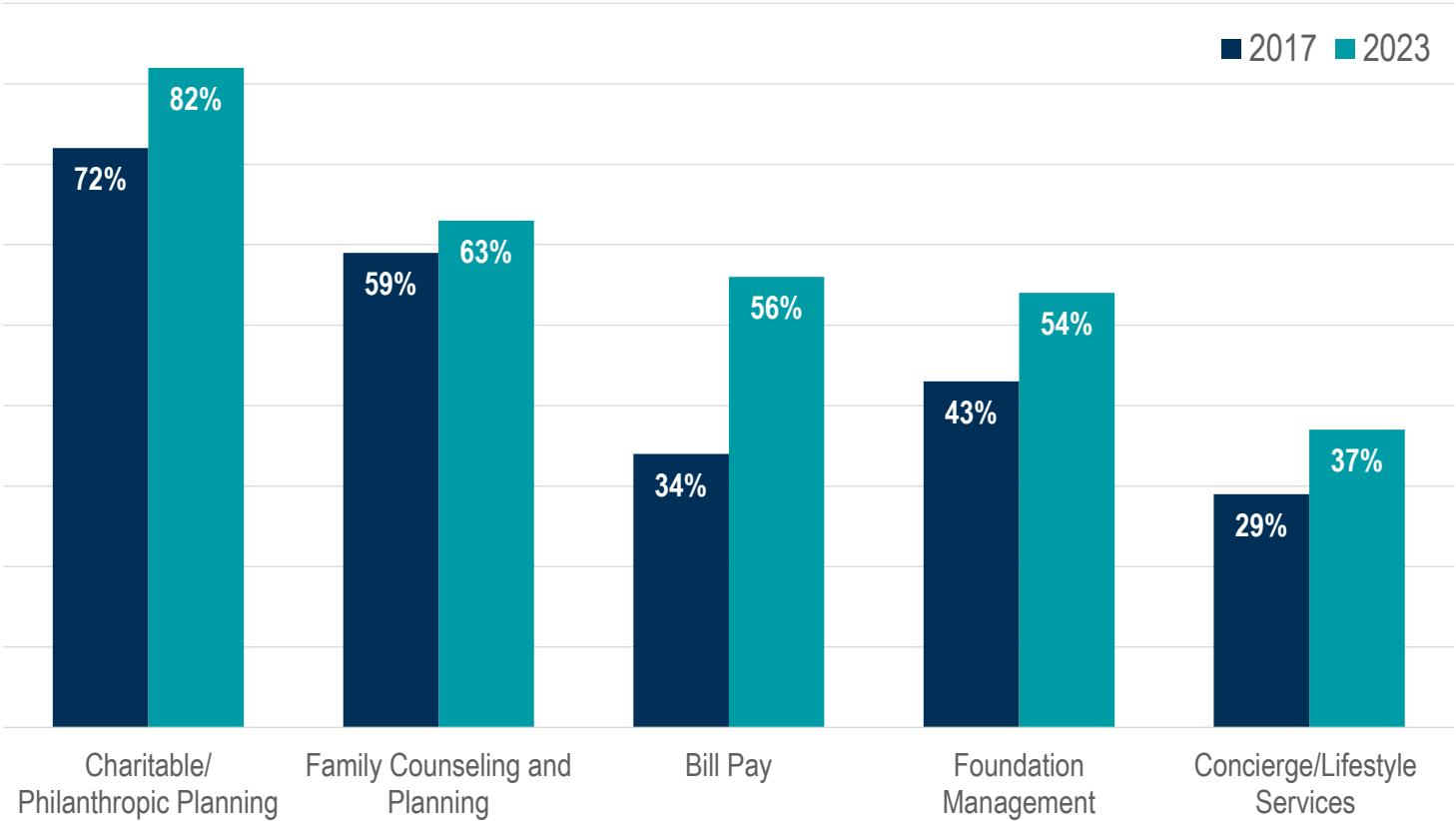
**PWC High Net Worth Investor Survey

***McKinsey & Co The looming advisor shortage in US wealth management

What is driving HNW Clients to Choose a Primary Provider?

	2020	2023
Services and Experiences	28%	35%
Relationships	31%	32%
Investment Performance/ Fees	27%	16%

Increased Offerings of Family Office Services (2017 vs 2023)



Sources: Cerulli Associates

“By 2030, American Women are expected to influence over \$30 trillion.”*

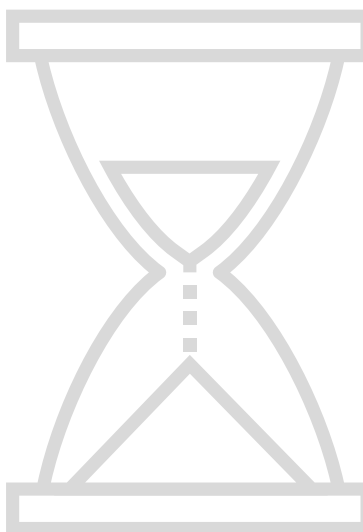
Holistic planning
Education
Relationship
Personalization

“\$72.6 trillion in assets expected to be transferred to heirs.”**

Behavioral coaching
Digital & tech
Values-driven
Alternative investments

“Just 19% of investors use their parents’ financial professional.”***

Values and Valuables
Holistic, Customization
Fortify & Grow
Individual and Family



*McKinsey & Company

**Cerulli Associates U.S. High-Net-Worth and Ultra-High-Net-Worth Markets 2021

***Cerulli Associates. The Cerulli Edge—U.S. Retail Investor Edition, 4Q 2023 Issue

WHO WHY → WHAT HOW ↩

- People, relationships, trust
- Expertise, authenticity
- Profession, passion, mission
- Loved ones, family
- Values and goals
- Life events and transitions
- Priorities, needs, preferences
- Emotions, feelings, past experiences
- Short-term, long-term, legacy

- Collaboration, coaching, guiding
- Goals and values-based planning
- Client experience, communication
- Events and education
- In-person + virtual
- Retirement, tax, estate, philanthropic planning
- Wealth management and investing
- Human behavior and psychology

Information Under Management

- Generation
- Last, first name
- Preferred communication method
- Birthday
- Acquainted (Y/N)
- Relationship to client
- Family dynamic
- Life phase
- Occupation
- Geographic location
- Hobbies/interests
- Priorities
- Preferences
- Values
- Goals
- Biases
- Belief systems
- Needs
- Wants

Process

Content



Channels



Curate



Consistency



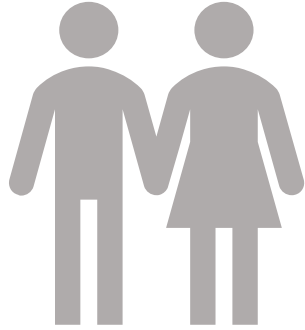
Hook



Content

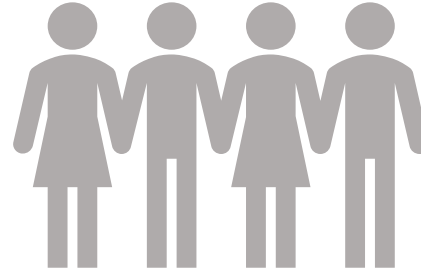


Who's the Audience?



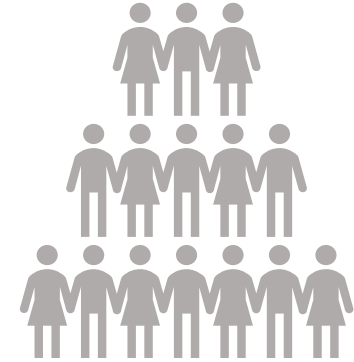
1:1

- Specific, small
- Hyper-personalized
- Top clients, prospects, COIs



1:some

- Targeted audience
- Have similar needs, preferences, priorities
- Shared experiences
- Niche market
- Feels personalized for the ideal recipient



1:many

- Wide reaching communication
- More about you than the recipient
- Least personalized

Timely & Timeless

Q1

- New year market outlook
- Tax planning
- February: Black history month
- Goal & habit setting
- Galentine's Day
- International Women's Day
- Spring break

Q2

- April: Financial literacy month
- Estate planning/doc spring cleaning
- Education for next gen/college grads
- Mother's Day/Father's Day
- Pride month
- Market update

Q3

- 4th of July
- Technology tool education
- Summer vacation
- Market update
- Back to school

Q4

- Philanthropy focus
- Market update
- Pies at Thanksgiving
- Team holiday photo/EOY message
- Family meetings

Greatest Opportunities for Growth

Ages 21-43

Real estate investments

Crypto / digital assets

Private equity

Personal company / brand

Direct investment into companies

Companies focused on positive impact

Fixed income

Emerging market equities

Domestic equities

International equities

Tangible assets

Private debt

Ages 44+

Domestic equities

Real estate investments

Emerging market equities

International equities

Private equity

Direct investment into companies

Companies focused on positive impact

Fixed income

Tangible assets

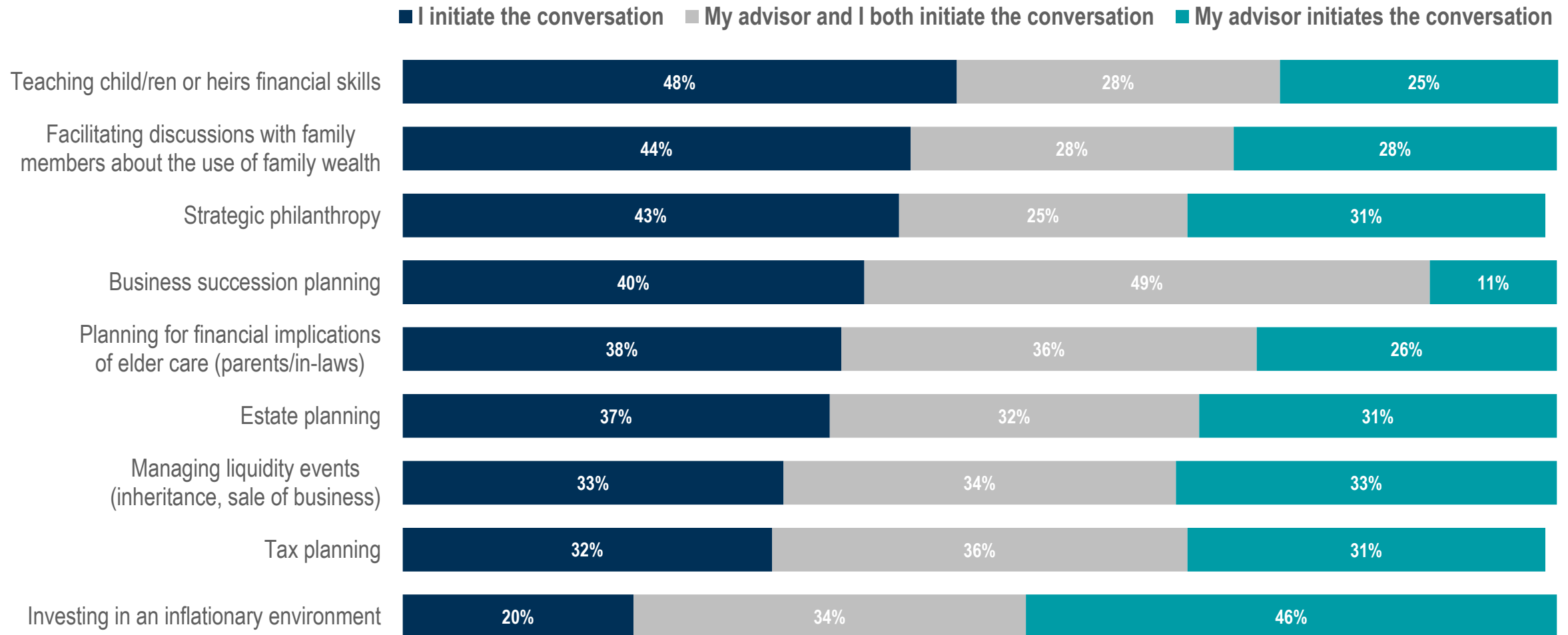
Personal company / brand

Crypto / digital assets

Private debt

Source: 2024 Bank of America Private Bank Study of Wealthy Americans

Initiating Conversations



Source: 2024 Bank of America Private Bank Study of Wealthy Americans

(Relevant) Transition

- Graduating Higher Education
- Couples and Newlyweds
- First child/grandchild
- ESG
- Retiring
- Selling a Business
- Business Owner/Operator
- Divorce/Widowed
- Legacy/estate planning
- Switching jobs
- Increasing Security Risks
- More life complexity

Educational Content

- "Adulthood 101"
- "Designing your Money Mindset Together"
- "Does a 529 Plan Make Sense?"
- "Aligning Impact with Investments"
- "Putting Passion and Purpose into Retirement"
- "5 FAQs Ahead of a Liquidity Event"
- "Separating your Personal and Professional Assets"
- "Checklist for Women Suddenly Single"
- "Legacy Love Letters"
- "Should you Roll your Retirement Account?"
- "Increase your Cyber Security"
- "Why a Financial Planner and Holistic Management"

Channel

- Video
- 1-pager
- Webinar
- Seminar
- Blog
- Newsletter
- Website
- Social Media
- Clients + Their Networks
- COIs

This example is for illustrative purposes only and is not a specific recommendation of First Trust Portfolios.

Experiences Outside the Money

In-person

- “Open house” at the office - stop by for some BBQ (bring a guest!)
- Shredding party - bring documents to be shredded and grab a shredded pork sandwich and a drink
- Cooking class
- Wine tasting
- Sporting event
- Pups and patios - rent out a restaurant or brewery patio for clients to bring their furry friends (or a human friend) to grab a drink and hang out
- Nail salon
- Golf or golf lessons
- Concert

Virtual

- Team member spotlight - interview each team member so clients can get to know them personally and professionally
- Video of the office and any changes you’ve made (new Keurig coffee machine?)
- Vacation gift - Mickey and Minnie Mouse ears for the whole family for their summer Disney trip
- Summer book/podcast club
- Wine tasting or cooking class
- Small gifts (birthday, anniversary, graduation, new job, new puppy, etc.)

1:1

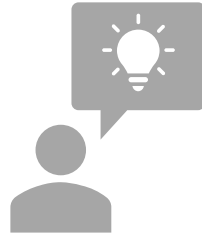
1:some

1:many

- Bring a guest
- Take a survey
- Send someone else

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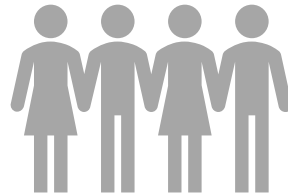
Who's Contributing?



Individual



Team



Clients



3rd parties, COIs

Channels



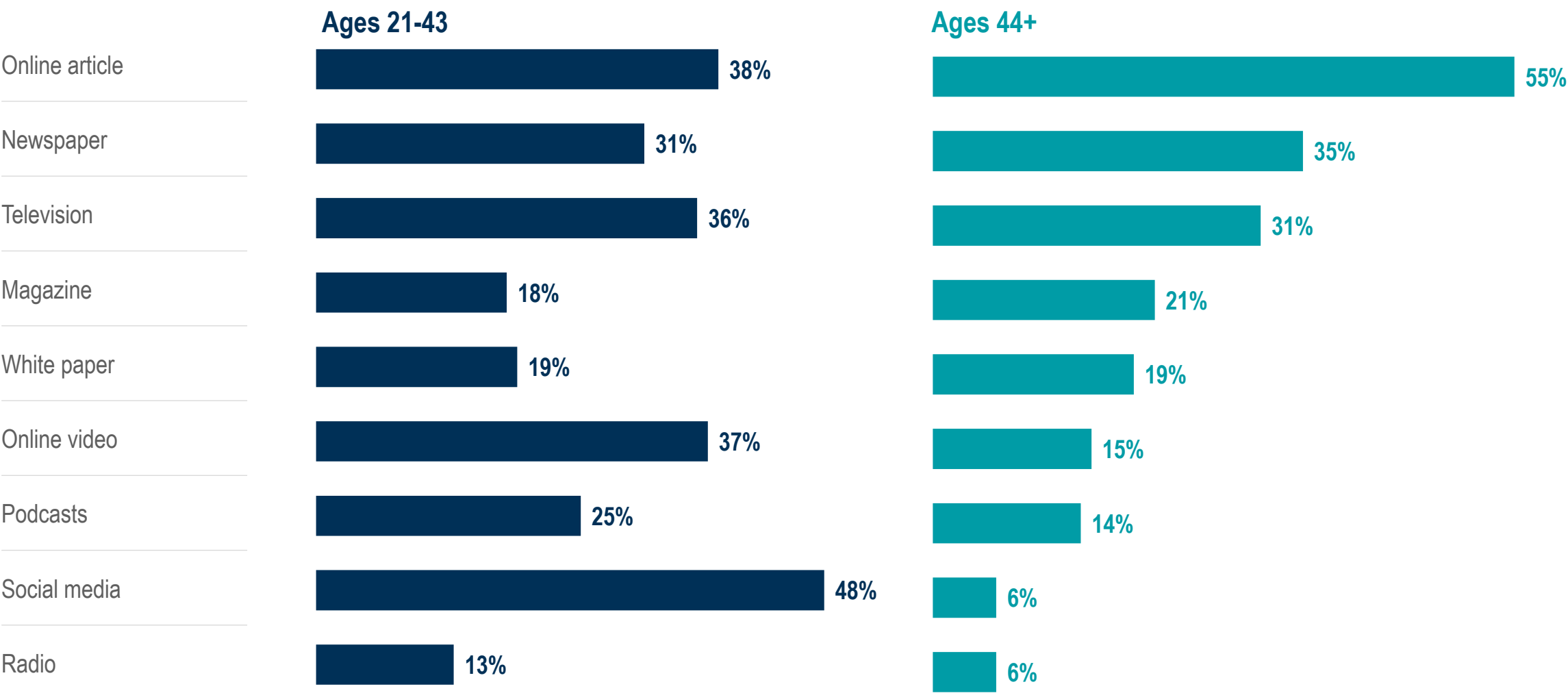
Content that Converts

**High Tech,
High Touch, Hybrid**

Give 10X

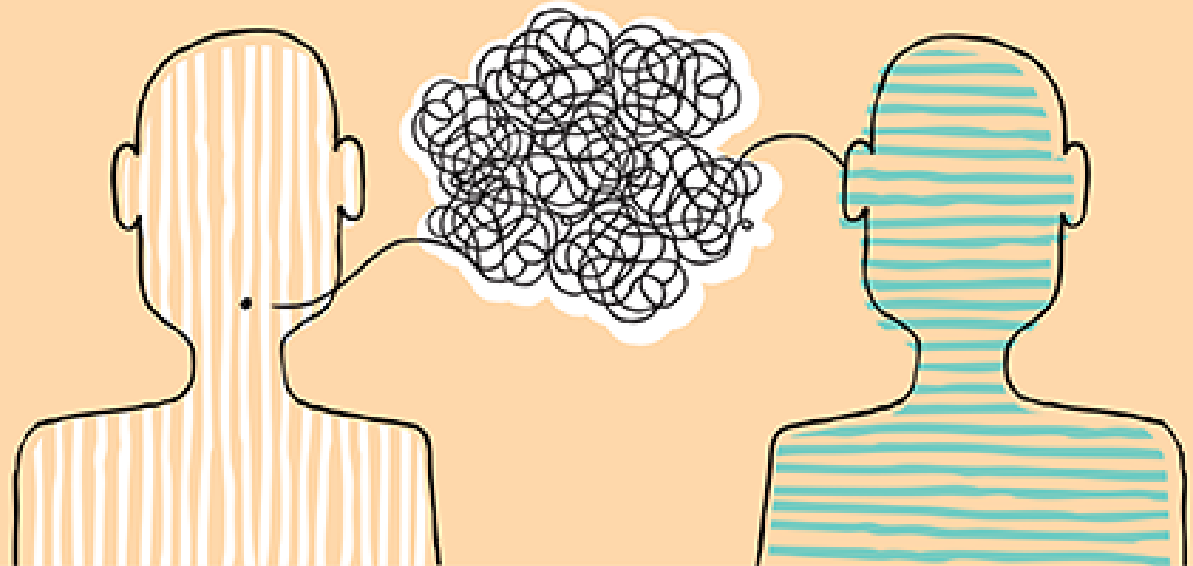
- FAQs
- Checklists
- Stories
- Social proof
- Expertise
- Personal
- Events
- Education
- Meaningful moments
- Pain-points
- Key words
- Headlines and hot topics
- Sans-jargon
- Authentic
- Hobbies
- What lights them up?

Preference for Financial Content



Source: 2024 Bank of America Private Bank Study of Wealthy Americans

Curate



“As you know, we work with clients from all walks of life, but we do have a particular expertise in working with women going through two of life’s biggest transitions. While this resource might not be relevant to you, we wanted all our valued clients to know the Checklist is here to empower anyone important to you feel organized and confident in potential gray areas. If anyone would like to speak with us directly, our contact information is there.”



Checklist

for Widows and Divorcees

Becoming suddenly single, whether expected or unexpected, can be one of the most complex emotional and financial situations an individual can experience. Educational resources, like a starting point, can alleviate some uncertainty for individuals potentially or currently experiencing these transitions. Deliverables designed to be shared with client Centers of Influence and whomever in their network highlights your expertise and furthers your exposure to individuals experiencing these transitions. The following checklists are a foundation for advisors building out resources for widows and divorcees, to be modified or expanded based on an individual’s situation.

Checklist for Widows

Strategic partners

Grief counselor, family counselor, estate attorney (licensed in deceased state of residence), health and wellness specialists, tax advisor, appraiser

Gather important documents

- Will/ trust
- Death certificate (make 10-20 copies), marriage certificate, deceased spouse’s birth certificate
- Health insurance policy
- Check safe deposit box
- Details of assets and debts (financial, physical)
 - Insurance policies, property deeds, financial accounts and statements, auto titles, retirement plans
- Tax returns
- Bills (mail and electronic, may need to check email)
- Important contacts, trusted advisors
- Phone and devices that hold important documents and information
- Research Social Security survivor benefits

Contact:

- Social Security office at 800-772-1213
 - Be ready with the Social Security numbers for you, your spouse, and any dependent children
- Your spouse’s employer
 - Request information about your spouse’s retirement plan and any other death benefits
- Your spouse’s former employers
- Your employer
- Estate executor and estate attorney
- Tax advisor
- Financial Advisor

Action:

- Don’t forget to breathe
- Cancel all credit cards in your spouse’s name
- Review health care coverage, stop deceased spouse’s health insurance and continue coverage for yourself and dependents
- Change the registration on any bills in your spouse’s name, set to autopay
- Update beneficiaries, tax withholding, and other information
- Close joint accounts
- Create a new budget
- Visualize the future, put one foot in front of the other

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Aging Relatives Checklist

Welcome to the ABC Family Wealth Checklist for Aging Relatives. This comprehensive tool is designed to help you gather and organize critical information about your aging relatives’ personal, medical, legal, and financial affairs. Proper documentation can greatly simplify legal processes, ensure personal wishes are honored, and provide peace of mind during emergencies.

How to use this checklist

1. **Gather Information:** Start by collecting information in each category. It’s best done through conversations with your relatives at a comfortable pace.
2. **Update Regularly:** Review and update the checklist at least annually or after any significant changes in health, financial status, or family dynamics.
3. **Keep Secure:** Store the checklist in a secure location and share its location with key family members or representatives who may need access in an emergency.

Personal Information

	Name	Contact #	Address
Emergency Contact			
Emergency Contact			
Emergency Contact			

Emergency Procedures

Immediate Actions (Who to call first, steps for securing personal safety, and how to access medical or legal documents quickly.)

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Client Personal Profile

- Loved Ones
- Pet's Names & Types
- Coffee Order
- Charities, Philanthropies
- Hobbies, Interests
- Preferred Method of Communication

Client Personal Profile

As we go through time together, helping you navigate the journey to your unique goals, we'd like to learn a little more about you, your interests and hobbies. This information enables us to further personalize your service through meaningful experiences, events and education. As always, no information will be shared outside of this office, as your privacy is a top concern.

Date: _____	
Name: _____	
Loved Ones (i.e. children, friends, siblings, parents)	Pet's Name and Type
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
Education	Charities and Volunteering
Spouse 1's alma mater: _____	Interested in volunteering? Yes [] No []
Spouse 1's graduation year: _____	Organization names:
Spouse 2's alma mater: _____	1. _____
Spouse 2's graduation year: _____	2. _____
	3. _____
Favorite Sports Teams	Favorite Books/Shows/Bands
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
Hobbies or Interests	Favorite Foods/Restaurants and Drinks
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
Are you a Veteran?	Wedding Anniversary (if applicable)
Yes [] No []	1. _____
What are you looking forward to personally/professionally?	Preferred Method of communication (check and fill out all that apply)
1. _____	Voice Message []:
2. _____	Email []:
3. _____	Mail []:
4. _____	Call []:
5. _____	Text []:
	In Person []:
	Webinar []:

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Influence Language

“Wow– we are thrilled at the excitement around the upcoming nine and wine event. Several of you have asked if you can bring a guest so we wanted to let everyone know that plus ones are welcome. We are limited on space and will try to accommodate as many of your guests as possible. Please RSVP by June 18.”

“Thank you for joining us on today’s webinar, if anyone would like to talk one on one, we’re happy to set up a 20 minute Ask Anything Session. During these sessions we can be a sounding board, second opinion, or help navigate feeling like you don’t know what you don’t know. Reach out to John at john@xyzplanning.com or click the link to our calendar.”

The Family Phone Call

1. Elevating with the new
SERVICE/RESOURCE
2. 10-minute introduction
3. Build relationships



The Family Phone Call: Sample Script

[Client]

A handful of our clients have expressed concern that as their loved ones navigate life's transitions, they may not be accessing expert or trusted resources necessary for developing good habits for stewarding wealth.

As some of our most valued relationships, those important to you are important to us. We are here for them always, but especially in the current environment. Whether they work with a financial professional or not, clients' loved ones leverage us as a sounding board, second opinion, for insight, education or when they feel like they don't know what they don't know.

As part of your client experience, we're excited to introduce the "Family Phone Call". The handful we've done so far have been a hit!

This resource is a **10-minute call** for you and your family – kids, grandkids, nieces, siblings, parents, in-laws, grandparents, or anyone you consider family.

During the family call with everyone, we'll have the opportunity to meet your loved ones and introduce ourselves so they know how we can help them one on one going forward.

Of course, all one-on-one conversations will be kept strictly confidential. Never will we discuss anything pertaining to you without your permission.

The format is flexible and customizable to your needs as well.

If you would like to set up a call, simply reply to this email with:

- Dates and times everyone is available in the near future
- Everyone's email addresses and contact information so we can send out an invitation with an agenda and details

Please let us know if you have any questions. We look forward to meeting your family.

Consistency

High Tech, High Touch, Hybrid

Sample Process

Weekly:

- 1 LinkedIn post
- 3 LinkedIn likes/comments
- 5 new connections
- 1 newsletter
- 5 unique client communications

Monthly:

- Educational focus
- 1 webinar, 1x per week
- 3 virtual experiences for 3 top households
- Subject matter expert opportunity
- 1 new video (posted on website, LinkedIn, shared in newsletter)

Quarterly:

- 1-to-many virtual experience
- Market update conference call
- Client advisory council
- 1 in-person seminar

Annually:

- Year-end engagement
- Family legacy letter
- Birthday & anniversary
- Family phone call

- Events
- Education
- Campaigns
- Meaningful touch-points

2025 CALENDAR EXAMPLE

Future-focused professionals are prioritizing the client experience like never before—focusing on campaigns, educational touchpoints, events, and meaningful client interactions. They understand that a next-level client experience not only deepens relationships but also fuels new client acquisition. A well-structured content calendar is essential for delivering consistent, value-driven interactions across the year. It allows you to anticipate client needs, stay top-of-mind, and ensure that every engagement—from meetings to personalized outreach—reinforces the high standard of service your clients expect. This sample calendar offers year-round ideas for events, education, and planning conversations, giving you a framework for timely, relevant touchpoints. As you build your own calendar, focus on what adds the most value to your target audience, while balancing it with your team's capacity for delivery. For additional support, reach out to your First Trust wholesalers to explore the resources available to help you plan and execute a strategic 2025 content calendar that drives both growth and client satisfaction.

<div>JANUARY</div> <ul style="list-style-type: none">• Post-holiday check-ins, setting/revisiting goals & plans with select clients• Campaign: Legacy Conversations: contributing to an investment solution to empower kids/ grandkids with a jump on financial literacy and investing• Monthly Newsletter (team spotlight to reinforce the value in your human capital)• 6-8 Social Media posts	<div>FEBRUARY</div> <ul style="list-style-type: none">• Galentine's Day• Long-term Care Planning Webinar• Family Movie Event• Monthly Newsletter• 6-8 Social Media posts	<div>MARCH</div> <ul style="list-style-type: none">• Celebrating International Women's Day• Quarterly Market Update video• Spring Break touch-points• Monthly Newsletter• March Madness Event• Retirement Income Planning Webinar• 6-8 Social Media posts
<div>APRIL</div> <ul style="list-style-type: none">• Financial Planning 101 Webinar (April is Financial Literacy Month)• Campaign: Family Phone Call• Shredding Event• Client Advisory Board Meeting• Monthly Newsletter• 6-8 Social Media posts	<div>MAY</div> <ul style="list-style-type: none">• Mother's Day charcuterie board experience in-person or virtual• "Welcome to the Family" dinner and gifts• Wine Down After Tax Season event for CPAs• Life 101 Webinar for recent college graduates• Markets and Margaritas Event• Monthly Newsletter• 6-8 Social Media posts	<div>JUNE</div> <ul style="list-style-type: none">• Father's Day Golf Event• Gifts and educational resources for those getting married• Quarterly Market Update Video• Pickleball Event• Monthly Newsletter• 6-8 Social Media posts
<div>JULY</div> <ul style="list-style-type: none">• Annual Family Day baseball game• Mid-year business planning and team retreat• Surprise & Delight: Send ice cream to select clients in celebration of summer• Monthly Newsletter• 6-8 Social Media posts	<div>AUGUST</div> <ul style="list-style-type: none">• Back to School: Send small gift to college-bound loved ones and a university mug or t-shirt to clients, other family members• Campaign: Mid-year planning check-ins with select clients• Monthly Newsletter• 6-8 Social Media posts	<div>SEPTEMBER</div> <ul style="list-style-type: none">• Food Truck Tailgate Event• Quarterly Market Update Video• Cyber Security Seminar and Webinar• Client Advisory Board Meeting• Women-Focused Event• Monthly Newsletter• 6-8 Social Media posts
<div>OCTOBER</div> <ul style="list-style-type: none">• Team Spotlight Series• Alternative Investments Seminar and Webinar• Client Survey• Next Gen Event• Monthly Newsletter• 6-8 Social Media posts	<div>NOVEMBER</div> <ul style="list-style-type: none">• Tax-loss Harvesting Campaign and Webinar• Next-year business planning and team holiday party• Pies for Thanksgiving• Monthly Newsletter• 6-8 Social Media posts	<div>DECEMBER</div> <ul style="list-style-type: none">• Holiday party for clients, prospects, and guests• "Year-in-Review & Gratitude" letter• Year-end Market Update and 2025 Outlook Video• Send gift to clients, prospects, COIs who are not local• 6-8 Social Media posts

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*A process to accelerate growth, by design.
Build your business with true intention.*



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Senior Vice President, Chief of Advisor Consulting

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Vice President, National Speaker

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Vice President, Advisor Consulting Performance Coach

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INSIGHTS & INNOVATIONS

CONGRATS GRAD! GRADUATION, CLIENTS & NEXT GEN ENGAGEMENT



Jackie Wilke
Vice President
Advisor Consultant

Do you remember your graduations? Do you remember the graduations of others (e.g., children, siblings, friends' children)?

Graduations are momentous occasions triggering a transition in life phases for the graduate and those connected to him or her. The graduate and their parents, family members, relatives, and friends have all most likely been invested emotionally and financially.

Elite teams honor this special occasion every April and May for their clients with graduates in their lives—be it their kids, grandkids, nieces, nephews, the children of their best friends, etc.

Why?

Financial professionals and teams centering educational content and experiences around this transition are:

- Building deeper, more meaningful client experiences
- Creating professional contrast
- Solidifying their role as the family's financial professional and consolidating assets
- Getting warm introductions to—or continuing to—engage next gens and future decision makers
- Accelerating introductions to clients' personal and professional networks who also have new graduates

When we design experiences and resources specific to a life transition, like a graduation, we foster opportunities for clients and prospects to engage with us when that life event is relevant to them. (Check out my blog post, ["Accelerate the Right Referrals: Define the Transition, Engage with Education"](#) to go deeper on this topic.)

Your expertise around that life event or transition is timeless, and for clients/prospects experiencing it, it feels personalized and timely, which adds to your professional contrast.

How?

For many in the class of 2022, school and graduation is still not "normal."

Here's how elite, high-performing professionals and teams have innovated to engage clients and the important graduates in their lives this graduation season:

Small gifts:

- Paraphernalia for parents and/or grandparents, like a t-shirt from the college a high school grad will be attending
- Business card holder, a hand-written note, and your team's business card
- Book on business, leadership, becoming good stewards of wealth, etc.
- Gift card to a restaurant in the new city to which the grad is moving

Education:

- "Life 101 Webinar": a financial literacy basics webinar for graduates headed into the "real world" (e.g., budgeting, saving, investing, differences in retirement accounts)
- Suggested podcasts on business, investing, personal, and professional development
- 20-minute "Ask Anything Session" for the graduate and the team to discuss any questions and share wisdom
- Family meeting

Graduation celebrations with your clients, family, and the graduate:

- Celebration dinner at the graduate's restaurant of choice
- Virtual wine or beer tasting as a family for graduates over 21 years of age

Insights & Innovations is a blog from First Trust's Advisor Consulting Group. If you are interested in learning more about consulting and coaching resources, please contact your First Trust wholesaler.

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Insights & Innovations Blog

Sample Content Calendar

Client Personal Profile

Checklist for Widows, Divorcees

Checklist for Aging Relatives

The Progression of Modern Value

2030 READY GUIDE

First Trust Advisor Consulting Group provides insights into ten critical strategies to help you get your business 2030-ready.

- Behavioral Finance & Coaching
- Capacity Building
- Magnetic Marketing
- Moving Up Market: Expanded Comprehensive & Personalized Services
- New Decision Makers: Rising Generations & Women Investors
- People-First, Personalized Brands
- Process-Driven Efficiency
- Team Development
- Technology & AI Integration
- Wealth Transfer & Family Wealth Management

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2030 Ready

A Blueprint for Future-Focused Financial Professionals

ne the future of financial advisory businesses. With shifting demographics and rapid technological advancements, we intentional planning and bold action. This guide highlights 10 critical areas—from artificial intelligence (AI) integration ext-gen”) of decision-makers and delivering personalized service—to help elite financial professionals build thriving,

id your team navigate and plan for these pivotal next five years and beyond. While the guide doesn't encompass every g that each business is unique, it highlights 10 key areas of practice management and growth (presented in no particular d-thinking financial professionals.

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