GAIN EFFICIENCY AND STREAMLINE THE
MANAGMENT OF YOUR MODEST SIZED ACCOUNTS

MAINSTREET ADVISORS

FAP

Streamline Portfolio Management with Turnkey and Personalized Portfolios

FAP Core Building Blocks



MANAGER RESEARCH

Rigorous research process selects top-tier investment managers.



DIVERSIFICATION

Combines equities, fixed income, and alternatives to balance return and risk.



DYNAMIC ALLOCATIONS

Maintain optimal portfolio allocations with timely adjustments to market conditions.



CUSTOMIZATION

Tailored portfolios for client specific guidelines and objectives.

Our Fund Allocation Portfolios (FAP) provide clients with a powerful resource to simplify portfolio management.

FAP are constructed using a combination of mutual funds and ETFs or entirely ETFs, dependent on client circumstances. FAP can also incorporate our Seperate Account Management (SAM) portfolios of stocks and bonds in larger accounts.

Broad asset class diversification is obtained through equities, fixed income, and alternatives such as commodities, hedging strategies, private credit, and private equity.

A powerful resource for managing client portfolios:

- ETF PORTFOLIOS
- FUND + ETF PORTFOLIOS
- AUTOMATED PORTFOLIO SOLUTIONS
- SUSTAINABLE LEADERS PORTFOLIOS
- YEAR END CAPITAL GAINS ASSESSMENT

MAINSTREET ADVISORS

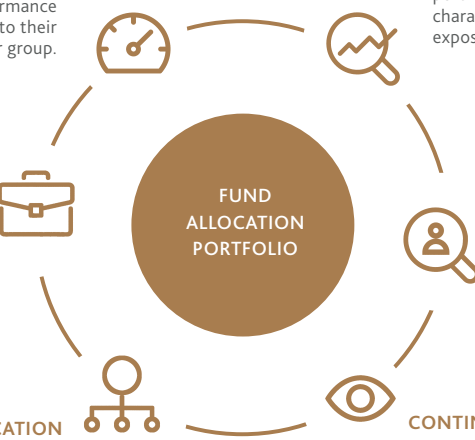
Rigorous Research Process Combined with Qualitative and Quantitative Analysis to Build Diversified Portfolios to Meet Clients' Personalized Needs.

PROPRIETARY MANAGER SCORE

Evaluating managers starts with our proprietary quantitative scoring tool that compares managers' performance and risk-adjusted statistics to their investment category peer group.

QUANTITATIVE ANALYSIS

Analyze managers' performance, portfolio construction and characteristics, risk factor exposure, and style consistency.



CLIENT PORTFOLIO MANAGEMENT

Tailor portfolios to clients' risk tolerance and financial objectives, with periodic rebalancing and opportunistic tax loss harvesting.

QUALITATIVE ANALYSIS

Meet with managers to assess their investment philosophy, process, and team.

ASSET ALLOCATION

Strategically adjust portfolio allocations across asset classes to capitalize on market opportunities and manage risk.

CONTINUOUS MONITORING

Managers are monitored using our proprietary fund score, update meetings with managers' investment teams, and periodic in-depth reviews in Fund Committee meetings.

Ready to grow your business?

Contact us today to discover how to add MSA Fund Allocation Portfolios to your Investment

Scan to learn more

Give your clients a custom-curated investing experience. | 312.223.02770 | info@mainstreetadv.com

MainStreet Advisors | 120 North LaSalle Street | Suite 3300 | Chicago Illinois | mainstreetadv.com

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