

**Investment  
expertise  
simply  
delivered.**

BlackRock Model Portfolios

**BlackRock®**



# BlackRock: your trusted partner.

## World leader in risk management

We help investors  
build resilient portfolios.

# 275

of the world's largest  
financial institutions rely  
on Aladdin®, our risk  
management technology.

Your advisor invests  
for you with the same  
technology used by the  
world's largest investors.

**Your goals are our goals.**

## Quality, value and choice

We provide investment  
solutions for every need.

# 400+

mutual funds and ETFs.

We construct portfolios with  
high quality investments  
from BlackRock and 3rd  
party managers.

Work with your advisor  
to build the portfolio  
that's best for you.

**Invest your way.**

## Singular client focus

We invest only on  
behalf of clients.

# \$6.47t

entrusted to us by clients,  
more than any other firm.

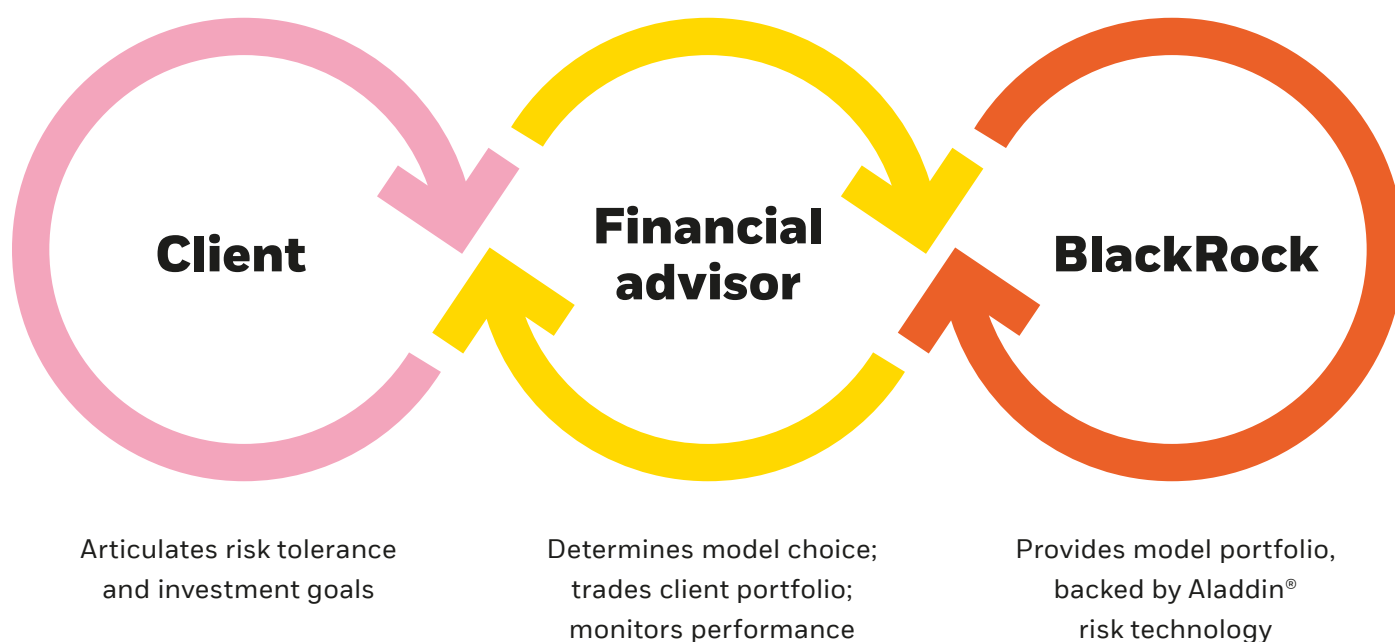
BlackRock doesn't  
trade for itself, so  
you can be sure that  
your best interest is  
our only interest.

**Feel confident.**

Source: BlackRock, as of 3/31/20. iShares is the largest provider of exchange-traded funds based on number of ETFs offered globally and assets under care.

# The right team can help you stay on track.

Your advisor has your financial future in mind and can build a strong foundation for your portfolio by starting with a BlackRock model.

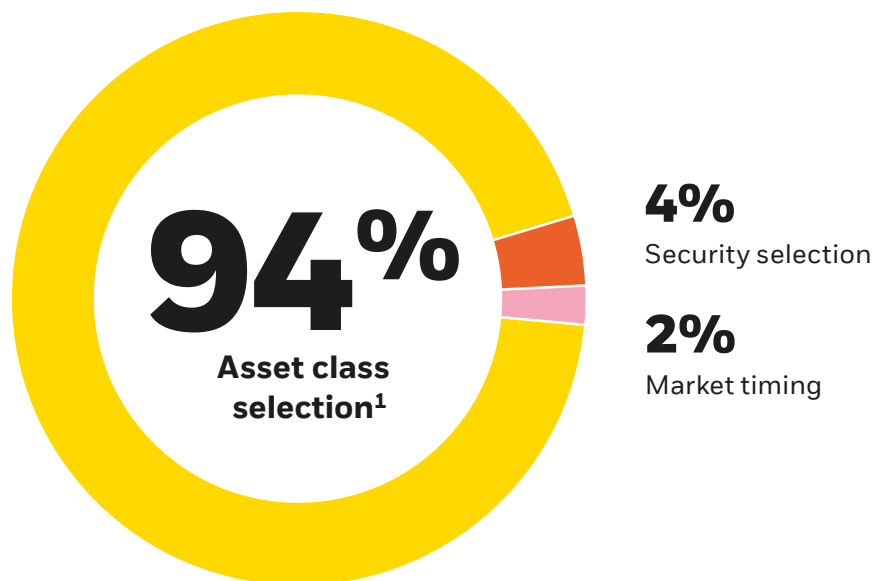


BlackRock, as of 12/31/19.



# The importance of diversification.

Building a diversified portfolio, across asset classes, is one of the most important components in reaching your financial goals. BlackRock Model Portfolios are invested in a range of funds aiming to help you achieve better returns within your risk level.



**BlackRock constructs each model portfolio with quality and cost-efficient investments across alpha, index and factors.**

#### **Alpha strategies**

Managers delivering active returns, not static tilts.

#### **Index strategies**

Low-cost, tax-efficient, broad market exposures.

#### **Factor strategies**

Historic drivers of outperformance or reduced risk.

1. Source: Brinson, Hood and Beebower - Financial Analysts Journal/January-February 1995. Diversification does not assure a profit, nor does it protect against loss of principal. Diversification among investment options and asset classes may help to reduce overall volatility.

# BlackRock Models

BlackRock has built a model portfolio menu to help meet your real life goals. Work with your financial advisor to invest in a portfolio that aligns with what you want to achieve.

## Helping you achieve your goals

Whether you are looking to aggressively grow your portfolio, maximize income or protect your nest egg for you and your loved ones, BlackRock has a model designed to help you achieve your goal.

■ **Build wealth**

■ **Spend wealth**

■ **Make it last**

## The way you want to invest\*

You can work with your financial advisor to choose a portfolio personalized to your preferences. From environmentally conscious investments to portfolios designed to help protect from market volatility, the choice is yours.

**ETFs, mutual funds or a combination of both**

**Traditional, environmentally sustainable or additional sources of return/risk**

**BlackRock only funds or a combination of BlackRock and 3rd party managers**

**Taxable or non-taxable (retirement)**

\*Not all model portfolios are available at every firm.

## Keeping you informed every step of the way

Portfolios are supported with commentaries, performance updates, podcasts and more to help you stay up to date on your investments.



**Explanations in plain language  
every time we make a trade**



**Market views and commentary  
from your portfolio managers**



**Materials to show you exactly  
what you are invested in and how  
your portfolio is performing**



**Podcasts released every quarter so  
you can hear directly from BlackRock**

# Built on world leading risk management.

We use technology to think beyond what's possible. Aladdin helps our portfolio managers identify risks and opportunities – helping build more resilient portfolios and managing exposures over time.

## Aladdin

The world's leading risk management technology

**3,000+**

risk factors  
assessed.

**2,300+**

engineers, data  
scientists and  
financial modelers  
powering Aladdin.

**275+**

of the world's  
largest  
institutions  
rely on Aladdin.

Source: BlackRock. All figures as of 3/31/20.

# Managed by a team of professionals.

Our sole focus is to deliver you well-built and dynamically managed portfolios.

## BlackRock Model Portfolios by the numbers:



**\$81<sub>b</sub>**

In global model portfolio AUM

**38**

Countries investing in our mandates

**20+**

Average years of investment experience

Source: BlackRock. All figures as of 3/31/20.

**Invested in your financial well-being.**

## Want to know more?

[blackrock.com/models](https://blackrock.com/models) | [askBlackRock@blackrock.com](mailto:askBlackRock@blackrock.com) | (1-877-ASK-1BLK)

### Important Notes:

***This information should not be relied upon as investment advice, research, or a recommendation by BlackRock regarding (i) the Funds, (ii) the use or suitability of the model portfolios or (iii) any security in particular. Only an investor and their financial advisor know enough about their circumstances to make an investment decision.***

***Carefully consider the BlackRock and iShares Funds within the model portfolios' investment objectives, risk factors, and charges and expenses before investing. This and other information can be found in the Funds' prospectuses or, if available, the summary prospectuses which may be obtained by visiting [www.iShares.com](http://www.iShares.com) or [www.blackrock.com](http://www.blackrock.com). Read the prospectus carefully before investing.***

***Investing involves risk, including possible loss of principal. Asset allocation and diversification may not protect against market risk, loss of principal or volatility of returns.***

The BlackRock Model Portfolios are provided for illustrative and educational purposes only, do not constitute research, investment advice or a fiduciary investment recommendation from BlackRock to any client of a third party financial advisor (each, a "Financial Advisor"), and are intended for use only by such Financial Advisor as a resource to help build a portfolio or as an input in the development of investment advice from such Financial Advisor to its own clients and shall not be the sole or primary basis for such Financial Advisor's recommendation and/or decision. Such Financial Advisors are responsible for making their own independent fiduciary judgment as to how to use the BlackRock Model Portfolios and/or whether to implement any trades for their clients. BlackRock does not have investment discretion over, or place trade orders for, any portfolios or accounts derived from the BlackRock Model Portfolios. BlackRock is not responsible for determining the appropriateness or suitability of the BlackRock Model Portfolios or any of the securities included therein for any client of a Financial Advisor. Information and other marketing materials provided by BlackRock concerning the BlackRock Model Portfolios – including holdings, performance, and other characteristics – may vary materially from any portfolios or accounts derived from the BlackRock Model Portfolios. Any performance shown for the BlackRock Model Portfolios does not include brokerage fees, commissions, or any overlay fee for portfolio management, which would further reduce returns. There is no guarantee that any investment strategy will be successful or achieve any particular level of results. The BlackRock Model Portfolios themselves are not funds. The BlackRock Model Portfolios, allocations, and data are subject to change.

This brochure pertains to both model portfolios available to financial professionals on select financial technology platforms as well as [www.blackrock.com/models](http://www.blackrock.com/models) and managed account strategies ("Managed Portfolio Strategies") available on select advisory platforms (collectively "BlackRock Model Portfolios"). Contact your financial advisor for more information regarding the different ways to access the BlackRock Model Portfolios..

Fixed income risks include interest-rate and credit risk. Typically, when interest rates rise, there is a corresponding decline in bond values. Credit risk refers to the possibility that the bond issuer will not be able to make principal and interest payments.

International investing involves risks, including risks related to foreign currency, limited liquidity, less government regulation and the possibility of substantial volatility due to adverse political, economic or other developments. These risks often are heightened for investments in emerging/developing markets and in concentrations of single countries.

Transactions in shares of ETFs may result in brokerage commissions and will generate tax consequences. All regulated investment companies are obliged to distribute portfolio gains to shareholders. There can be no assurance that an active trading market for shares of an ETF will develop or be maintained.

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Not FDIC Insured • May Lose Value • No Bank Guarantee

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