



New Frontier Advisors Celebrates 10 Years of Helping Financial Advisors Meet Clients' Income Goals with 3 Multi-Asset Income ETF Portfolios

New Frontier Advisors is offering a new interactive Income Tool for financial advisors to explore investment solutions for their income-oriented clients. Advisors can review various scenarios by adjusting input fields including initial investment, time period, and cash flows to view the potential income they would have generated across New Frontier's three multi-asset income portfolios.

New Frontier Multi-Asset Income ETF Portfolios are offered at 3 risk levels (conservative, balanced and growth) allowing investors the flexibility to adjust their portfolios, should their circumstances and investment objectives change.

Designed to help protect against inflation, New Frontier Multi-Asset Income ETF Portfolios strive for long-term capital appreciation in addition to sustainable income.

Boston, MA, September 22, 2022 – New Frontier Advisors, a leader in portfolio optimization, celebrates the 10th anniversary of its customer-centric product suite, the New Frontier Multi-Asset Income Portfolios. One decade after inception, these income portfolios continue to provide an innovative option for financial advisors in pursuit of investment income for their clients. Borne of a desire to apply its institutional investment management acumen with financial advisors and their retail clients, New Frontier Advisors designed three income-focused model portfolios to provide both enhanced income and long-term price appreciation. The portfolios contain dividend-income-oriented Exchange Traded Funds (ETFs) that offer significant diversification and risk management benefits. Since their inception, the portfolios have not only delivered on their primary objective of providing a reliable source of income, but they have also outperformed on a long-term, risk-adjusted total return basis.

Since June 30, 2012, our New Frontier Multi-Asset Income Balanced Portfolio with a 60/40 equities to bonds allocation has delivered an average yield of 3.9 percent or roughly twice the yield from broad equity markets and core bonds. Our track record shows income growing steadily at an annual rate of 2 percent if all income is distributed each year and an annual rate of 5.5 percent if reinvested, outpacing the average rate of inflation. In dollar terms, a \$1,000,000 portfolio would have generated approximate income of \$41,000 in the first year to over \$50,000 in the tenth year. In addition to generating a sustainable income during the last ten years, New Frontier Advisors' Multi-Asset Income Balanced Portfolio generated an annual capital appreciation of 2.2 percent.

The New Frontier Multi-Asset Income Portfolios are designed to meet the needs of investors who desire sustainable income over extended investment horizons with a focus on risk management. Since this product offering aims for both market returns and income, constituent multi-asset income portfolios contain dividend-income-oriented ETFs as well as ETFs that offer significant diversification and risk management benefits. The resulting portfolios provide the opportunity to benefit from long-term price appreciation and enhanced income.

“Our Multi-Asset Income Portfolios are built from low-cost ETFs and offered at three risk levels. This allows income-oriented investors the transparency to find the right portfolio for their investment goal

and the flexibility to adjust as their needs change. Our New Frontier Multi-Asset Income Portfolios have a proven track record of delivering sustainable, long-term income even during challenging markets,” said David Esch, Chief Research Officer at New Frontier.

These distinct risk-targeted model portfolios are optimized for income using New Frontier Advisors’ patented technology, including [Michaud Optimization](#) and the [Michaud-Esch Rebalance Test](#). Both techniques result in significant diversification and mitigation of financial risks.

“This 10-year milestone for our New Frontier Multi-Asset Income Portfolios is a testament to the effectiveness of our unique investment process and philosophy as well as our knack in optimizing portfolios. This distinction sets us apart in the industry and affirms our commitment to providing financial advisors and their clients with the benefits of a highly diversified and risk-managed investment solution. We are elated at what we have achieved by providing an income solution that removes the guesswork out of conversations between advisors and clients, so they are confident in achieving their financial goals.” said Robert Michaud, Chief Investment Officer at New Frontier.

To learn more about New Frontier Advisors’ Multi-Asset Income Portfolios, visit www.FrontierAdvisor.com/MAI, and explore our user-friendly Income Tool to discover the long-term benefits New Frontier Multi-Asset ETF Portfolios offer to income-oriented investors.

About New Frontier Advisors

[New Frontier Advisors, LLC](#) is a privately-owned investment management firm based in Boston, MA. New Frontier Advisors optimizes investment portfolios for financial advisors and their clients, so they have the greatest probability of reaching their long-term financial goals. Founded in 1999, New Frontier Advisors manages \$4.5B in assets under management as of June 30, 2022. A recognized leader in portfolio optimization, and the first Exchange Traded Fund (ETF) strategist, New Frontier Advisors pioneered the construction of portfolios using ETFs. Using proprietary research, patented investment technology in portfolio optimization and rebalancing, and a disciplined investment management process with a two-decade track record, the New Frontier Advisors team is committed to customizing risk-managed portfolios for its clients.

Note: Past performance does not guarantee future results. The New Frontier Multi-Asset Income Portfolios ten-year track record is measured for the time period that starts on June 30, 2012 and ends on June 30, 2022. The performance of the MSCI ACWI Index represents broad equity market performance. The performance of the Core US Aggregate Bond Index represents core bond sector performance. The average rate of inflation is the average of annual percent change in CPI-U from 2012 through 2021. Inflation data is sourced from the U.S. Bureau of Labor Statistics. The benchmark for the New Frontier Multi-Asset Income Balanced Portfolio is a sixty percent-forty percent weighted combination of the Dow Jones Global Select Dividend Index and the ICE BoAML US Broad Market Index, respectively.

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