

siebert.NXT

MANAGED PORTFOLIOS

Modern Investing Made Easy





**"SIEBERT.NXT
TECHNOLOGY HELPS YOU
REACH YOUR FINANCIAL
GOALS. YOU CAN FOCUS
ON WHAT'S MOST
IMPORTANT, WE'LL TAKE
CARE OF THE REST."**

Mark Malek
Chief Investment Officer, SiebertNXT¹

WHY CHOOSE **siebert.NXT**

Our goal is simple. To help you meet your investment goals. SiebertNXT is a professionally managed advisory platform that utilizes Modern Portfolio Theory to assess investment goals, risk tolerance and time horizon.



DEDICATED
ADVICE



PERSONALIZED
SERVICE



COMPETITIVE
PRICING



MANAGED PORTFOLIOS

siebert.NXT + WEALTH MANAGER

SiebertNXT Premiere combines the benefit of our Smart Portfolios² and access to a dedicated Wealth Manager who takes a comprehensive, holistic approach to building your financial plan.



PERSONALIZED
WEALTH MANAGEMENT
WITH TAILORED
PORTFOLIOS BASED ON
YOUR FINANCIAL GOALS.

siebert.NXT

ADVANTAGES OF USING A WEALTH MANAGER

A Wealth Manager can help you prioritize your goals like saving for college and retirement, create a plan for reaching them, and provide portfolio recommendations in your best interest.

No matter where you are in life, you can depend on our investment management expertise to build a plan that can help you achieve financial security.



PROACTIVE AND CONSULTATIVE

We work with our clients to identify an appropriate asset allocation, then tailor a specific smart portfolio. We will work with you to create a customized managed account that includes monthly reviews, ongoing re-balancing, and regular engagement.



A HANDS-ON APPROACH

Allow us to handle all your Wealth Management needs so that you can spend your time enjoying life to the fullest.

MANAGED PORTFOLIOS

siebert.NXT PREMIERE

SERVICE FEE
UP TO 1.25%

Work with a Wealth Manager plus SiebertNXT smart technology and you receive:

SIEBERTNXT PLATFORM

- Get started with \$25,000
- 40 portfolio and income portfolio options
- Automated rebalancing
- Multi-portfolio strategies
- Dedicated customer support
- News & Research based on your portfolio

PLUS...

PROVIDED BY WEALTH MANAGER & THIRD PARTY PARTNERSHIPS:

- Full Financial & Retirement Plan
- Custom created ETFs tailored to your investment goals
- Tax Loss Harvesting & Tax Location
- Financial Decisions Support (including Insurance, Home Financing, Stock Option and Compensation)
- Corporate & Muni Bonds, Notes, UITs and Mutual Funds, New Issues & IPOs
- Estate, Tax & Legacy Portfolio Construction
- Donor Advised Funds
- Private Equity & Hedge Fund Review
- Deferred Compensation Strategy
- Estate Attorney & CPA Collaboration

A woman with long, wavy brown hair and black-rimmed glasses is smiling and looking towards the camera. She is wearing a white button-down shirt and holding a silver tablet with both hands. The background is a blurred indoor setting with warm, bokeh-style lights and green foliage.

OUR PORTFOLIOS ARE
CAREFULLY DESIGNED
TO PUT **YOUR NEEDS**
FRONT AND CENTER
WHERE THEY BELONG.

THE POWER OF TECHNOLOGY WITH **siebert.NXT**

AUTOMATICALLY REBALANCED, SMART PORTFOLIOS²

Built to help you reach your goals and invest in what matters.

The SiebertNXT platform directly selects a mixture of exchange-traded funds (ETFs) & exchange-traded notes (ETNs)³ and builds them into your portfolios tailored to fit your investment profile. We match your responses from our Investor Profile Questionnaire with portfolios that support your risk tolerance Ranging from very conservative, conservative, moderate, moderately aggressive, and aggressive.

HOW IT WORKS

To get started, here's what you can expect:



COMPLETE OUR INVESTOR QUESTIONNAIRE

We'll better understand your financial goals, risk tolerance and timeline.



GET MATCHED WITH A DIVERSIFIED PORTFOLIO

Complete with ETFs & ETNs that seek to meet your investment objectives.



CHOOSE YOUR PLAN

Standard to invest online only or SiebertNXT Premiere to receive both online investing plus 1:1 unlimited guidance from a Wealth Manager.



CHECK IN ON YOUR TERMS

We monitor your portfolio daily and automatically rebalance⁴ it when needed.

OUR PORTFOLIOS ARE CONSTANTLY EVOLVING

We evaluate how every investment affects your overall portfolio's risk and return by utilizing Modern Portfolio Theory*. Our programs will help you construct a diversified asset allocation strategy that seeks to help maximize returns at your given level of risk.

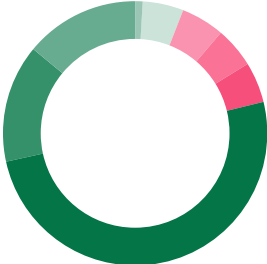
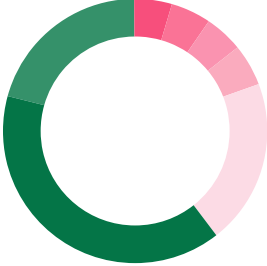
Our Wealth Managers work closely with you to create a diversified portfolio tailored to suit your specific needs.

*Your investment goal should be to maximize your return for the amount of risk that you are comfortable accepting. To do this, you need a properly allocated and diversified portfolio. This is the basis of Modern Portfolio Theory (MPT). Developed by Nobel Laureate Harry Markowitz and refined by other noted economists over the years, MPT suggests that you can limit the volatility in your portfolio while improving its performance by spreading the risk among different types of securities that don't always behave the same way.

OUR PORTFOLIO SELECTIONS

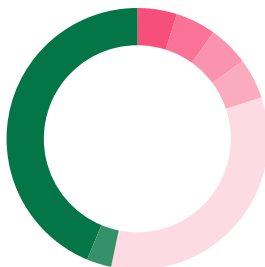
To select a portfolio, talk to your Wealth Manager, who can help you build a wealth strategy focused on your long-term goals.

Our portfolios are carefully designed to put your needs front and center—where they belong. We think your portfolio should be working for you no matter what investment approach or style is in favor at any given time. That’s why we keep them broadly diversified across asset classes, managers, and investment styles. We offer portfolios for both taxable and tax-deferred accounts.

MANAGED PORTFOLIOS	ALLOCATION	ASSET CLASS*
<p>NXT SECURE CONSERVATIVE</p> <p>For investors who are predominately risk-averse. Primary focus is on portfolio stability and preservation of capital. Investors using this model should be willing to achieve investment returns (adjusted for inflation) that are low or, in some years, negative, in exchange for reduced risk of principal loss and a high level of liquidity.</p>		<p>~20-30% STOCKS ~70-80% BONDS</p>
<p>NXT FOCUS MODERATELY CONSERVATIVE</p> <p>For investors who are somewhat riskaverse. Primary focus is to achieve a modest level of portfolio appreciation with minimal principal loss and volatility. Investors using this model should be willing to absorb some level of volatility and principal loss.</p>		<p>~30-40% STOCKS ~60-70% BONDS</p>

NXT BALANCED BALANCED

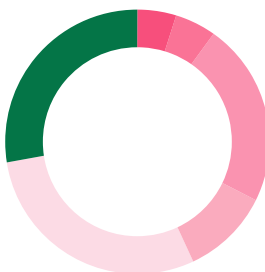
For investors who are willing to take a moderate level of risk. Primary emphasis is to strike a balance between portfolio stability and portfolio appreciation. Investors using this model should be willing to assume a moderate level of volatility and risk of principal loss.



~40-60% STOCKS
~40-60% BONDS

NXT GROWTH MODERATELY AGGRESSIVE

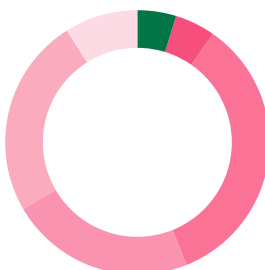
For investors who are willing to take a fair amount of risk. Primary emphasis is on achieving portfolio appreciation over time. Investors using this model should be willing to assume a high level of portfolio volatility and risk of principal loss.



~60-90% STOCKS
~10-40% BONDS

NXT ADVANCE AGGRESSIVE

For investors who are willing to take substantial risk. Primary emphasis is on achieving above-average portfolio appreciation over time. Investors using this model should be willing to assume a significant level of portfolio volatility and risk of principal loss.



~90-100% STOCKS
~0-10% BONDS

*Asset classes shown are determined by Siebert AdvisorNXT Category groups. Allocation at the individual account level may vary. Neither diversification nor asset allocation ensure a profit or guarantee against a loss. Those asset classes noted may be known to be a growth engine, income producer, or volatility dampener but there is no guarantee this will hold true. Allocations by asset class that are illustrated are examples and for informational purposes only. They are not determinative of actual allocations, which may vary slightly out of the stated ranges.

DISCLAIMER:

¹ SiebertNXT provides discretionary investment management for a fee. Advisory services are offered by Siebert AdvisorNXT, LLC., a Registered Investment Advisor ("RIA"). SiebertNXT is a shorthand reference to the RIA Siebert AdvisorNXT, LLC., and any reference to SiebertNXT is meant to imply reference to Siebert AdvisorNXT, LLC.

² A smart portfolio is one that specifically seeks to meet an investor's goal based on a comprehensive questionnaire provided to the client upon account opening. We then provide you a diversified portfolio consisting of ETFs and ETNs that meet your specific needs and risk tolerance. Our cutting-edge technology then monitors and rebalances your investments at appropriate times to help keep you diversified and on track.

³ Investors should consider the investment objective and unique risk profile of Exchange-Traded Products (ETPs), including Exchange Traded Funds (ETFs) and Exchange-Traded Notes (ETNs), carefully before investing. ETPs are subject to risks similar to those of other diversified portfolios. ETP trading will generate tax consequences. Although ETPs are designed to provide investment results that generally correspond to the performance of their respective underlying indices, they may not be able to exactly replicate the performance of the indices because of expenses and other factors. A prospectus contains this and other information about the ETP and should be read carefully before investing. ETFs are required to distribute portfolio gains to shareholders at year end. These gains may be generated by portfolio rebalancing or the need to meet diversification requirements. ETNs also contain credit risk of an underlying issuer. If the issuer defaults on the note, investors may lose some or all of their investment.

⁴ When portfolio drift exceeds a certain threshold, the portfolio manager will then evaluate when the best execution for a rebalance will occur. A rebalance occurs when the difference between your original target allocation for your portfolio and the actual weights in your current portfolio has shifted more than 5%. This 5%, or the difference between what your original target asset allocation was and where your current asset allocation is; is called portfolio drift. Portfolios adjust and change over time due to many factors in the market place. SiebertNXT has custom built in features alongside our investment team that help automatically rebalance your account. If we see your portfolio isn't on track for what your original allocation should be, the portfolio rebalances or "readjusts" to get you back on target based on your risk analysis and investment goals.

This brochure is for informational purposes only and does not constitute a complete description of our investment services or performance. This information is in no way a solicitation or offer to sell securities or investment advisory services except, where applicable, in states where we are registered or where an exemption or exclusion from such registration exists. Information throughout this brochure whether stock quotes, charts, articles, or any other statement or statements regarding market or other financial information, is obtained from sources which we, and our suppliers believe reliable, but we do not warrant or guarantee the timeliness or accuracy of this information. Nothing in this brochure should be interpreted to state nor imply that past results are an indication of future performance. Neither we or our information providers shall be liable for any errors or inaccuracies, regardless of cause. Similar investment management services might be available elsewhere at lower cost.

The information in this brochure, whether charts, graphs, growth rates, allocations or any other statement regarding financial information is obtained from sources which we believe reliable, but we do not warrant or guarantee the timeliness or accuracy of this information. Any historical, or assumed historical data used and shown in this brochure has no bearing on what the future actual returns might be for the strategies that are mentioned.

There are no warranties, expressed or implied, as to the accuracy, completeness, or results obtained from any information in this brochure. Clients and potential clients are reminded that any investment in securities involves a degree of risk, which could always amount to the complete loss of principal. Market factors, investment style differences and investment management skills are some of the factors that will determine how well your investment performs. Clients and potential clients are strongly advised to carefully investigate their investment opportunity, including inquiring of its trusted advisor or advisors and then only invest once satisfied that the evaluation process has been satisfactory. Clients and potential clients are encouraged to check the background of their advisor on FINRA's BrokerCheck.

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Muriel Siebert & Co., LLC. is an affiliated broker-dealer of the public holding company, Siebert Financial Corporation, which also owns Siebert AdvisorNXT LLC.

For more information on Siebert AdvisorNXT LLC. and our advisory services, call us at 1-800-993-2010 to speak with a professional investment advisor. Learn

how we can assist in the success of your financial future.

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