



## Simplifying Structured Investments

### Broad-Based Indices (BBI)

## Income

### Investment Summary

BBI Income Structured Notes (BISN) utilize structured notes linked to, but not limited to, indices such as the S&P 500, Nasdaq-100, and Russell 2000. The strategy targets income and total return in the mid to high singles. With a moderately conservative risk profile, BISN is built for income-focused investors who seek more than traditional fixed income can offer, while maintaining disciplined risk controls.

**Target Client:** Conservative to moderate seeking income

#### Main Objectives:



**Downside  
Protection  
Features**



**Broad  
Indices**



**Steady  
Income**

**Target:  
Mid-High  
Singles  
Income**

### BBI INCOME INVESTMENT SUMMARY

- **Minimum Investment: \$20,000**
- Available on qualified and non-qualified accounts
- Available on multiple custodians through **Strategy Link**
- Tax Document: 1099 from custodian
- Management Fee: .95%
- Risk Profile: Conservative-Moderate



Statements in this communication regarding financial projection, potential exit scenarios, business strategy and plans and objectives for future operations are forward-looking statements. Words such as "Target," "Anticipated," "Believe," or "Estimate" and other expressions, identify forward-looking statements under the Private Securities Litigation Reform Act of 1995. Forward-looking statements are based on assumptions made by, and information currently available to Ancorato. Other phrases like, "Track record," "has exercised," and the like are words that denote historical data exists to support the assertion, but historical data does not guarantee future results.