

# RELIANCE TRUST COLLECTIVE INVESTMENT TRUST (CIT) SOLUTIONS

## Explore why CITs deserve a place in your advisory toolkit and how they can elevate your clients' retirement plans to new heights.

In the ever-evolving financial landscape, financial advisors must stay ahead of the curve to deliver exceptional value and results for their clients. Collective Investment Trusts (CITs) have emerged as a powerful investment vehicle, offering a unique blend of cost-efficiency, customization and flexibility that is increasingly relevant in today's retirement space. Exploring the potential of CITs can unlock new opportunities for your clients, helping them achieve their retirement goals more effectively.



#### **COST EFFICIENCY**

CITs often have lower expense ratios and administrative costs compared to mutual funds, potentially leading to higher net returns and improved retirement outcomes for clients.



#### **CUSTOMIZATION AND FLEXIBILITY**

CITs enable advisors to tailor investment solutions to clients' specific needs and risk profiles, providing more personalized investment strategies and diverse options.



#### TAX ADVANTAGES

CITs offer notable tax benefits, including exemption from federal income tax and no shareholder-level capital gains taxes, resulting in more tax-efficient investment growth, and optimized after-tax returns for clients.



#### **SPEED TO MARKET**

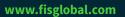
CITs have a streamlined regulatory framework, allowing for quicker product development and launch compared to other institutional investment vehicles. This ensures timely access to innovative strategies for clients.

For more information, please reach out to Chris Speer, Head of Reliance Trust CIT Distribution at christopher.speer@fisglobal.com or 617-694-3681, or Jason Graf, Senior Strategic Sales Executive at jason.graf@fisglobal.com or 203-833-3707.

### **RELIANCE TRUST CIT SOLUTIONS**

Asset Class	Fund Name	CUSIP
US Asset Allocation	3D/L Global Managed ETF Portfolios	89826A102
Corporate Bond	Legal & General Liability Corporate CIT	52472A636
	Legal & General US Credit CIT	52472A610
Diversified Emerging Mkts	LSV Emerging Markets Equity Tier IV	66585Y323
	Driehaus Emerging Markets Equity	391536109
	GQG Partners Emerging Markets Eq CIT A	75947L150
	Legal & General Emerging Market CIT NL	52472A131
	Pzena Emerging Markets Focused Val CL A	75947M109
	Skerryvore Global Emerging Markets DC CL I	75947P706
	Legal & General MSCI ACWI ex US CIT NL	52472V861
Foreign Large Blend	Legal & General MSCI EAFE DC CIT A	52472V820
	Marathon-London Glbl Ex US CIT CL MCIT.D	66585Y232
	Marathon-London Intl. CIT MECT.CN2	75947M844
	GQG Partners Intl. Equity CIT A	75947L184
	Trinity Street International Equity I	75947M117
Foreign Large Value	LSV Intl Value Equity Tier VII	66585Y273
	Pzena Int Val All Country (ex-U.S.)	66585Y851
Global Allocation	Brookfield Real Asset Securities CIT I	75947L523
Global Large-Stock Blend	Legal & General MSCI ACWI CIT NL	52472V507
Global Large-Stock Growth	GQG Partners Global Equity CIT A	75947L226
Global Real Estate	Presima Global Real Estate Conc.	66585Y703
Infrastructure	First Sentier Global Listed Infras CIT I	66585Y802
	Legal & General Global Core Infras A	52472V366
ntermediate Core Bond	DoubleLine Securitized Income CL 2	66586A506
Intermediate Core-Plus Bond	DoubleLine Core Plus Fixed Income CL 2	66585Y802
	Envestnet Western Asset Core plus	75947M497
	DoubleLine Total Return Bond CL 1	66585Y729
US Large Blend	Legal & General S&P 500 CIT NL	52472A164
	Legal & General MSCI USA NL	52472V804
US Large Growth	Vulcan Value Partners CIF – Large Cap 1	75947M273
US Large Value	LSV US Large Cap Val Tier 1	66585Y612
	Legal & General Russell 1000 CIT NL	52472A503
Long-Term Bond	Legal & General Long Dur US Credit CIT	52472A594
	Legal & General Long Liability Corp CIT	52472A628
	DoubleLine Long Dur Total Return Bond CL 2	66585Y364
Short-Term Bond	Sage Cash Balance Ultra Conservative	75954Y103
	Sage Cash Balance Conservative	75954Y400
	Sage Cash Balance Moderate	75954Y707
US Small Cap Blend	Legal & General Russell 2000 CIT NL	52472A800
Stable Value	MetLife Reliance Trust 25053 CL 0	759522204
	New York Life Anchor CIT CL 0	75954K103















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