

## Taxonomy - Select UMA Asset Class Reclassifications

**Starting in May 2015, Morgan Stanley began to implement a series of changes to standardize the asset classification of securities and investment products offered in our various Consulting Group advisory programs. As a result of this effort, certain investment products held in clients' Select UMA account(s) will be reclassified.**

**The below chart lists the Select UMA investment products that will be reclassified to the New Asset Class.**

INVESTMENT PRODUCT	TICKER	PRODUCT TYPE	ASSET CLASS PRIOR TO MAY 2015	NEW ASSET CLASS
Absolute Strategies I	ASFIX	MF	HEDGED STRATEGIES	EQUITY MARKET NEUTRAL
Alger Small/Mid Cap Growth Equity	-	SMA	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
Alger SMid Cap Growth A	ALMAX	MF	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
Alger SMid Cap Growth I	ASIMX	MF	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
AllianzGI Income & Growth P	AIGPX	MF	TACTICAL ALLOCATION	US MULTI ASSET
Altegris Fixed Income Long Short I	FXDIX	MF	ALTERNATIVE HYBRID	CREDIT LONG/SHORT
American Funds American Balanced F2	AMBFX	MF	GLOBAL BALANCED	US MULTI ASSET
American Funds Capital Income Bldr F2	CAIFX	MF	GLOBAL BALANCED	GLOBAL MULTI ASSET
American Funds Income Fund of Amer F2	AMEFX	MF	GLOBAL BALANCED	US MULTI ASSET
American Funds New Economy F2	NEFFX	MF	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
Apex Capital Management Small/Mid Growth	-	SMA	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
Ariel Investor	ARGFX	MF	US SMALL MID CAP VALUE EQUITY	US MID CAP VALUE
ASTON/Cornerstone Large Cap Value I	AAVIX	MF	US LARGE CAP VALUE EQUITY	US LARGE CAP
Atlanta Capital Management High Quality SMID	-	SMA	US SMALL MID CAP CORE EQUITY	US MID CAP
BlackRock Global Allocation Instl	MALOX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
BlackRock Global Long/Short Credit Instl	BGCIX	MF	ALTERNATIVE HYBRID	CREDIT LONG/SHORT
BlackRock Global Long/Short Equity Fund	BDMIX	MF	EQUITY LONG/SHORT	MARKET NEUTRAL
BlackRock Multi-Asset Income Instl	BIICX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
BlackRock Strategic Income Opps Instl	BSIIX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
BlackRock US Opportunities Instl	BMCIX	MF	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
Boston Partners Small/Mid Cap Value	-	SMA	US SMALL MID CAP VALUE EQUITY	US SMALL CAP VALUE
Brandes Investment Partners Value Equity	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Brandes Investment Partners Value Equity	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Cadinha & Co. Conservative Asset Allocator	-	SMA	TACTICAL ALLOCATION	US MULTI ASSET
Calamos Convertible I	CICVX	MF	CONVERTIBLE SECURITIES	US EQUITIES OTHER
Calamos Growth & Income I	CGIIX	MF	CONVERTIBLE SECURITIES	US EQUITIES OTHER
Calamos Market Neutral Income Fund	CMNIX	MF	HEDGED MULTI-STRATEGY	MARKET NEUTRAL
Cambiar Investors Small/Mid Cap Value	-	SMA	US SMALL MID CAP VALUE EQUITY	US MID CAP VALUE
Cambiar SMID Investor	CAMMX	MF	US SMALL MID CAP VALUE EQUITY	US MID CAP VALUE
Center Coast Capital Advisors MLP SMA	-	SMA	COMMODITIES - ENERGY	MASTER LTD PARTNERSHIPS
Cincinnati Asset Management Broad Market Fixed Income	-	SMA	CORPORATE FIXED INCOME	US TAXABLE CORE
Cincinnati Asset Management Investment Grade Fixed Income	-	SMA	CORPORATE FIXED INCOME	US TAXABLE CORE
ClearBridge Aggressive Growth I	SAGYX	MF	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
ClearBridge All Cap Growth Equity	-	SMA	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH

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INVESTMENT PRODUCT	TICKER	PRODUCT TYPE	ASSET CLASS PRIOR TO MAY 2015	NEW ASSET CLASS
ClearBridge All Cap Value Equity	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
ClearBridge All Cap Value ESG	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
ClearBridge All Cap Value I	SFVYX	MF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
ClearBridge Multi Cap Growth ESG	-	SMA	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
ClearBridge Multi-Cap Growth Equity	-	SMA	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
ClearBridge Opportunity Equity	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
ClearBridge Tactical Dividend Income I	LADIX	MF	US MULTI CAP CORE EQUITY	GLOBAL TACTICAL
Columbia Acorn Z	ACRNX	MF	US SMALL MID CAP CORE EQUITY	US MID CAP
Columbia Flexible Capital Income Z	CFIZX	MF	TACTICAL ALLOCATION	US MULTI ASSET
Consumer Discretionary Select Sector SPDR	XLY	ETF	CONSUMER DISCRETIONARY	US EQUITIES OTHER
Consumer Staples Select Sector SPDR	XLP	ETF	CONSUMER STAPLES	US EQUITIES OTHER
CRM Small/Mid Cap Value Instl	CRIAX	MF	US SMALL MID CAP VALUE EQUITY	US MID CAP VALUE
Davis Advisors All Cap Core Equity	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Davis Opportunity Y	DGOYX	MF	US MULTI CAP CORE EQUITY	US LARGE CAP
Delaware Diversified Income Instl	DPFFX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
Delaware Smid Cap Growth Instl	DFDIX	MF	US SMALL MID CAP GROWTH EQUITY	US SMALL CAP GROWTH
Dreyfus Opportunistic Fixed Income I	DSTRX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
Dreyfus/Standish Global Fixed Income I	SDGIX	MF	INTERNATIONAL BONDS	GLOBAL FIXED INCOME
Earnest Partners Small Cap Value	-	SMA	US SMALL MID CAP VALUE EQUITY	US SMALL CAP VALUE
Earnest Partners Small/Mid Core	-	SMA	US SMALL MID CAP CORE EQUITY	US MID CAP
Eaton Vance Gbl Macr Absolute Return I	EIGMX	MF	ALTERNATIVE HYBRID	GLOBAL MACRO
Eaton Vance Gbl Macro Abs Ret Advtg I	EGRIX	MF	ALTERNATIVE HYBRID	GLOBAL MACRO
Eaton Vance High-Yield Municipal Inc I	EIHYX	MF	US MUNICIPAL FIXED INCOME	HIGH YIELD MUNI F.I.
Eaton Vance Management Long Term Municipal Bond	-	SMA	US MUNICIPAL FIXED INCOME	LONG TERM MUNICIPALS
Energy Select Sector SPDR	XLE	ETF	COMMODITIES - ENERGY	US EQUITIES OTHER
Equity Investment Corporation All Cap Value Equity	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Federated Capital Income Institutional	CAPSX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Federated Clover Investment Advisors All Cap Value	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Federated Investors Strategic Value Dividend	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Federated Prudent Bear Instl	PBRIX	MF	TACTICAL ALLOCATION	EQUITY HEDGE ASSETS- OTHER
Federated Strategic Value Dividend Instl	SVAIX	MF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Fidelity Advisor® Corporate Bond I	FCBIX	MF	CORPORATE FIXED INCOME	US TAXABLE CORE
Financials Select Sector SPDR	XLF	ETF	FINANCIAL SERVICES	US EQUITIES OTHER

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Forward Broadmark Tactical Growth	-	SMA	TACTICAL ALLOCATION	US MULTI ASSET
Forward Tactical Growth Advisor	FTGMX	MF	TACTICAL ALLOCATION	US MULTI ASSET
Foundry Partners All Cap Value	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Franklin CA Tax-Free Inc Adv	FCAVX	MF	US LONG TERM MUNICIPAL FIXED INCOME	US Tax Free Core
Franklin Convertible Securities Adv	FCSZX	MF	CONVERTIBLE SECURITIES	US EQUITIES OTHER
Franklin NY Tax-Free Income Adv	FNAYX	MF	US LONG TERM MUNICIPAL FIXED INCOME	US Tax Free Core
Gabelli Equity Income I	GCIEX	MF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Global Investment Solutions Fundamental US All Cap Equity ex. MLP	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Global Investment Solutions Fundamental US Cap Equity	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Global Investment Solutions Fundamental US Small/Mid Cap Core Equity	-	SMA	US SMALL MID CAP CORE EQUITY	US MID CAP
Global Investment Solutions Multi-Manaer GIC Theme	-	SMA	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Golden Capital Small/Mid Cap Core	-	SMA	US SMALL MID CAP CORE EQUITY	US SMALL CAP
Goldman Sachs Strategic Income Instl	GSZIX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
Good Harbor U.S. Tactical Core	-	SMA	TACTICAL ALLOCATION	US MULTI ASSET
Great Lakes Advisors Disciplined Equity All Cap Core Equity	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Great Lakes Advisors Disciplined Equity SMID Cap Core Equity	-	SMA	US SMALL MID CAP CORE EQUITY	US SMALL CAP
Guggenheim Macro Opportunities Instl	GIOIX	MF	FIXED INCOME OPPORTUNISTIC	CREDIT LONG/SHORT
Guggenheim Multi-Asset Income ETF	CVY	ETF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
GW Capital Small/Mid Cap Value Equity	-	SMA	US SMALL MID CAP VALUE EQUITY	US MID CAP VALUE
GW&K Investment Management Small Mid Core	-	SMA	US SMALL MID CAP CORE EQUITY	US MID CAP
Harding Loevner Frontier Emerg Mkts Inst	HLFMX	MF	EMERGING MARKETS EQUITY	FRONTIER MARKETS
Hays Advisory Global ETF	-	SMA	TACTICAL ALLOCATION	US MULTI ASSET
Health Care Select Sector SPDR	XLV	ETF	HEALTH & BIOTECHNOLOGY	US EQUITIES OTHER
Henderson Global Tech I	HFGIX	MF	TECHNOLOGY	GLOBAL EQUITIES OTHER
Industrials Select Sector SPDR	XLI	ETF	INDUSTRIALS	US EQUITIES OTHER
Invesco Balanced-Risk Allc Y	ABRYX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Invesco Equally-Wtd S&P 500 Y	VADDX	MF	US LARGE CAP VALUE EQUITY	US LARGE CAP
Invesco Equity and Income Y	ACETX	MF	GLOBAL BALANCED	US MULTI ASSET
Invesco Global Markets Strategy Fund	GMSHX	MF	HEDGED MULTI-STRATEGY	GLOBAL MACRO
iShares Core U.S. Growth ETF	IUSG	ETF	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
iShares Core U.S. Value ETF	IUSV	ETF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
iShares Global Energy ETF	IXC	ETF	COMMODITIES - ENERGY	GLOBAL EQUITIES OTHER
iShares Global Financials ETF	IXG	ETF	FINANCIAL SERVICES	GLOBAL EQUITIES OTHER

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INVESTMENT PRODUCT	TICKER	PRODUCT TYPE	ASSET CLASS PRIOR TO MAY 2015	NEW ASSET CLASS
iShares Global Healthcare ETF	IXJ	ETF	HEALTH & BIOTECHNOLOGY	GLOBAL EQUITIES OTHER
iShares Global Tech ETF	IXN	ETF	TECHNOLOGY	GLOBAL EQUITIES OTHER
iShares iBoxx \$ Investment Grade Corporate Bond ETF	LQD	ETF	CORPORATE FIXED INCOME	US TAXABLE CORE
iShares MSCI EMU ETF	EZU	ETF	EUROPE EX UK EQUITY	EUROPEAN EQUITIES
iShares MSCI Frontier 100 ETF	FM	ETF	EMERGING MARKETS EQUITY	FRONTIER MARKETS
iShares MSCI KLD 400 Social ETF	DSI	ETF	US MULTI CAP CORE EQUITY	US LARGE CAP
iShares MSCI United Kingdom ETF	EWU	ETF	UNITED KINGDOM EQUITY	INTERNATIONAL EQUITIES- OTHER
iShares Russell 3000 ETF	IWV	ETF	US MULTI CAP CORE EQUITY	US LARGE CAP
iShares Select Dividend ETF	DVY	ETF	US LARGE CAP CORE EQUITY	US LARGE CAP VALUE
Ivy Asset Strategy I	IVAEX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Ivy Science & Technology I	ISTIX	MF	TECHNOLOGY	US EQUITIES OTHER
JP Morgan Asset Management Intrepid Multi Cap Core	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
JP Morgan Asset Management Municipal STEP 1-5 Year	-	SMA	US MUNICIPAL FIXED INCOME	SHORT TERM MUNICIPALS
JP Morgan Asset Management Municipal STEP 1-17 Year	-	SMA	US MUNICIPAL FIXED INCOME	LONG TERM MUNICIPALS
JPMorgan Income Builder Select	JNBSX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
JPMorgan Mortgage-Backed Securities Sel	OMBIX	MF	MORTGAGE BACKED BONDS	SECURITIZED
JPMorgan Research Market Neutral Select	JMNSX	MF	ALTERNATIVE HYBRID	EQUITY MARKET NEUTRAL
JPMorgan Strategic Income Opps Sel	JSOSX	MF	ALTERNATIVE HYBRID	GLOBAL FIXED INCOME- OTHER
JPMorgan U.S. Large Cap Core Plus	JLPSX	MF	US LARGE CAP	EQUITY LONG/SHORT
JPMorgan Value Advantage Select	JVASX	MF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Kayne Anderson Rudnick Investment Small Mid Cap Core Equity	-	SMA	US SMALL MID CAP CORE EQUITY	US MID CAP
Lateef I	LIMIX	MF	US MULTI CAP CORE EQUITY	US LARGE CAP
Lateef Large Cap Growth	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Lateef Multi Cap Growth Equity	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Legg Mason BW Alternative Credit I	LMANX	MF	ALTERNATIVE HYBRID	CREDIT LONG/SHORT
Loomis Sayles Investment Grade Bond Y	LSIIX	MF	CORPORATE FIXED INCOME	US TAXABLE CORE
Lord Abbett Bond-Debenture F	LBDFX	MF	HIGH YIELD FIXED INCOME	GLOBAL FIXED INCOME- OTHER
Lord Abbett Convertible F	LBFFX	MF	CONVERTIBLE SECURITIES	US EQUITIES OTHER
Lord, Abbett & Company Multi Cap Value Equity	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Madison Investment Advisors Intermediate Corporate Only	-	SMA	CORPORATE FIXED INCOME	US TAXABLE CORE
Materials Select Sector SPDR	XLB	ETF	MATERIALS	US EQUITIES OTHER
MDT Advisers All Cap Core	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Merger Investor	MERFX	MF	ALTERNATIVE HYBRID	EVENT DRIVEN/CREDIT
MFS® Total Return I	MTRIX	MF	GLOBAL BALANCED	US MULTI ASSET

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INVESTMENT PRODUCT	TICKER	PRODUCT TYPE	ASSET CLASS PRIOR TO MAY 2015	NEW ASSET CLASS
Miller Howard Income Equity (with MLPs)	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Miller Howard Income Equity (without MLPs)	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Miller Howard Infrastructure	-	SMA	UTILITIES	INFRASTRUCTURE
Miller Howard MLP Strategy	-	SMA	COMMODITIES - ENERGY	MASTER LTD PARTNERSHIPS
Minneapolis Port. Mgmt. Group All Cap Value	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Morgan Stanley Inst Frontier EMkts I	MFMIX	MF	EMERGING MARKETS EQUITY	FRONTIER MARKETS
Morgan Stanley Inst Multi-Asst I	MMPIX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Morgan Stanley Multi Cap Growth I	CPODX	MF	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
Morgan Stanley US Govt Secs I	USGDX	MF	US CORE FIXED INCOME	SECURITIZED
Munder Capital Management Mid Cap Core Growth SMA	-	SMA	US MID CAP CORE EQUITY	US MID CAP GROWTH
Neuberger Berman Equity Income Inst	NBHI	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Neuberger Berman Socially Responsible Investing	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Neuberger Berman Socially Rspns Inst	NBSLX	MF	US MULTI CAP CORE EQUITY	US LARGE CAP
Neuberger Berman Strategic Income I	NSTLX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
Nuveen NWQ Multi-Cap Value I	NQVRX	MF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Nuveen Tradewinds Value Opportunities I	NVORX	MF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
NWQ Investment Management Special Equity	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Oak Ridge Investments All Cap Growth	-	SMA	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
Oak Ridge Investments Small/Mid Cap Growth	-	SMA	US SMALL MID CAP GROWTH EQUITY	US SMALL CAP GROWTH
Olstein All Cap Value Adv	OFAFX	MF	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Penn Capital Small/Mid Cap Core	-	SMA	US SMALL MID CAP CORE EQUITY	US SMALL CAP
PIMCO All Asset All Authority P	PAUPX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
PIMCO All Asset P	PALPX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
PIMCO Credit Absolute Return P	PPCRX	MF	ALTERNATIVE HYBRID	CREDIT LONG/SHORT
PIMCO Income P	PONPX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
PIMCO Investment Grade Corp Bd P	PBDPX	MF	CORPORATE FIXED INCOME	US TAXABLE CORE
PIMCO Unconstrained Bond P	PUCPX	MF	ALTERNATIVE HYBRID	GLOBAL FIXED INCOME- OTHER
Pinnacle Associates Small and Mid Cap Equity	-	SMA	US SMALL MID CAP CORE EQUITY	US MID CAP
Pioneer Dynamic Credit Y	RCRYX	MF	ALTERNATIVE HYBRID	GLOBAL FIXED INCOME- OTHER
Pioneer Strategic Income Y	STRYX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
PowerShares Dynamic Market Portfolio	PWC	ETF	US MULTI CAP CORE EQUITY	US LARGE CAP
PowerShares FTSE RAFI US 1500 Small-Mid Portfolio	PRFZ	ETF	US SMALL MID CAP CORE EQUITY	US SMALL CAP
PowerShares WilderHill Clean Energy Portfolio	PBW	ETF	COMMODITIES - ENERGY	COMMODITIES
Principal Global Div Inc P	PGDPX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Prudential Jennison Small Company Z	PSCZX	MF	US SMALL MID CAP CORE EQUITY	US SMALL CAP

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Putnam Capital Spectrum Y	PVSYX	MF	TACTICAL ALLOCATION	US MULTI ASSET
Putnam Diversified Income Y	PDVYX	MF	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
Renaissance Large Cap Growth Equity	-	SMA	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
Richard Bernstein Advisors Global Government/Corporate Fixed Income	-	SMA	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Riverbridge Partners Eco Leaders	-	SMA	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
Riverbridge Partners Small/Mid Cap Growth	-	SMA	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
Riverfront Investment Group Asset Allocation Moderate Growth & Income	-	SMA	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Riverfront Investment Group Global Growth	-	SMA	US LARGE CAP CORE EQUITY	GLOBAL MULTI ASSET
Riverfront Investment Group Global Growth	-	SMA	US LARGE CAP CORE EQUITY	GLOBAL MULTI ASSET
Roosevelt Investment Group All Cap Core Equity	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Sage Advisory Services Intermediate Corporate Only	-	SMA	CORPORATE FIXED INCOME	US TAXABLE CORE
Schafer Cullen Small Cap Value	-	SMA	US SMALL MID CAP VALUE EQUITY	US SMALL CAP VALUE
Segall, Bryant and Hamill All Cap Core	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP
Snow Capital All Cap Value	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
SPDR Barclays Convertible Bond ETF	CWB	ETF	CONVERTIBLE SECURITIES	US EQUITIES OTHER
SPDR Dow Jones International Real Estate ETF	RWX	ETF	GLOBAL REITS	REITS
SPDR S&P Dividend ETF	SDY	ETF	US LARGE CAP CORE EQUITY	US LARGE CAP VALUE
TCW Total Return Bond I	TGLMX	MF	MORTGAGE BACKED BONDS	SECURITIZED
Technology Select Sector SPDR	XLK	ETF	TECHNOLOGY	US EQUITIES OTHER
Templeton Global Bond Adv	TGBAX	MF	INTERNATIONAL BONDS	GLOBAL FIXED INCOME
The London Company Small-Mid Cap Core	-	SMA	US SMALL MID CAP CORE EQUITY	US MID CAP
ThomasPartners Inc. Divident Growth Strategy (K-1 Generating)	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
ThomasPartners Inc. Divident Growth Strategy (Non K-1 Generating)	-	SMA	US MULTI CAP VALUE EQUITY	US LARGE CAP VALUE
Thompson, Siegel & Walmsley SMID Cap Value	-	SMA	US SMALL MID CAP VALUE EQUITY	US SMALL CAP VALUE
Thornburg Investment Income Builder I	TIBIX	MF	GLOBAL BALANCED	GLOBAL MULTI ASSET
Thornburg Limited Term Income Instl	THIIX	MF	US SHORT TERM FIXED INCOME	US TAXABLE CORE
Tortoise MLP & Pipeline Instl	TORIX	MF	COMMODITIES - ENERGY	INFRASTRUCTURE
Tradewinds Global Investors Small/Mid Cap Value	-	SMA	US SMALL MID CAP VALUE EQUITY	US SMALL CAP VALUE
Utilities Select Sector SPDR	XLU	ETF	UTILITIES	US EQUITIES OTHER
Vanguard Consumer Discretionary ETF	VCR	ETF	CONSUMER DISCRETIONARY	US EQUITIES OTHER
Vanguard Consumer Staples ETF	VDC	ETF	CONSUMER STAPLES	US EQUITIES OTHER
Vanguard Energy ETF	VDE	ETF	COMMODITIES - ENERGY	US EQUITIES OTHER
Vanguard Extended Market ETF	VXF	ETF	US SMALL MID CAP CORE EQUITY	US SMALL CAP

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Vanguard Financials ETF	VFH	ETF	FINANCIAL SERVICES	US EQUITIES OTHER
Vanguard Health Care ETF	VHT	ETF	HEALTH & BIOTECHNOLOGY	US EQUITIES OTHER
Vanguard Industrials ETF	VIS	ETF	INDUSTRIALS	US EQUITIES OTHER
Vanguard Information Technology ETF	VGT	ETF	TECHNOLOGY	US EQUITIES OTHER
Vanguard Materials ETF	VAW	ETF	MATERIALS	US EQUITIES OTHER
Vanguard Telecom Services ETF	VOX	ETF	TELECOM SERVICES	US EQUITIES OTHER
Vanguard Total Stock Market ETF	VTI	ETF	US MULTI CAP CORE EQUITY	US LARGE CAP
Vanguard Utilities ETF	VPU	ETF	UTILITIES	US EQUITIES OTHER
Victory Investment Grade Convertible Fd	SBFCX	MF	CONVERTIBLE SECURITIES	US EQUITIES OTHER
Victory Investment Grade Convertible I	VICIX	MF	CONVERTIBLE SECURITIES	US EQUITIES OTHER
Voya Global Target Payment Fund	IGPIX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Voya Investment Management Strategic Fixed Income	-	SMA	FIXED INCOME OPPORTUNISTIC	GLOBAL FIXED INCOME- OTHER
Wells Fargo Advantage Absolute Ret Adm	WARDX	MF	TACTICAL ALLOCATION	GLOBAL MULTI ASSET
Wells Fargo Advantage Discovery Adm	WFDDX	MF	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
Wells Fargo Advantage Government Sec Ad	WGSDX	MF	US CORE FIXED INCOME	SECURITIZED
Wells Fargo Fundamental All Cap Growth Equity	-	SMA	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
Wells Fargo Fundamental Small/Mid Cap Growth	-	SMA	US SMALL MID CAP GROWTH EQUITY	US MID CAP GROWTH
Western Asset California Municipals I	LMCUX	MF	US LONG TERM MUNICIPAL FIXED INCOME	US Tax Free Core
Western Asset Management Current Market Municipal Portfolio	-	SMA	US MUNICIPAL FIXED INCOME	SHORT TERM MUNICIPALS
Western Asset Municipal High Income I	LMHIX	MF	US MUNICIPAL FIXED INCOME	HIGH YIELD MUNI F.I.
Western Asset New Jersey Municipals I	LNJIX	MF	US LONG TERM MUNICIPAL FIXED INCOME	US Tax Free Core
Western Asset New York Municipals I	SNPYX	MF	US LONG TERM MUNICIPAL FIXED INCOME	US Tax Free Core
WHV Investment Management International Equity ADR	-	SMA	INTERNATIONAL EQUITY	GLOBAL EQUITIES
William Blair Growth I	BGFIX	MF	US MULTI CAP GROWTH EQUITY	US LARGE CAP GROWTH
Zacks Investment Management All Cap Core	-	SMA	US MULTI CAP CORE EQUITY	US LARGE CAP

This document is for informational purposes only and should not be construed as a recommendation to buy, sell or hold any investment product listed in this table. It is intended to inform clients who are already invested in any of the products shown above in our Select UMA investment advisory program about the reclassification.

**Please consider the investment objectives, risks, charges and expenses of an exchange-traded fund (ETF) or mutual fund carefully before investing. The prospectus contains this and other information about the ETF or mutual fund. Your Financial Advisor can give you the prospectus for any ETF or mutual fund in which you are considering investing. Please read it carefully before investing.**

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MF = Mutual Fund

ETF = Exchange-Traded Fund

SMA = Separately Managed Account