

# What Distinguishes an **AAM** UIT?

- > Experienced Team and Growing Network of Strategic Relationships
- > Innovation
- > Personalized Service and Ongoing Support

For nearly 40 years, Advisors Asset Management, Inc. (AAM) has been a trusted resource for financial advisors. Our experienced Advisory Consultants provide financial advisors with customized advice and ongoing support, along with a broad range of carefully selected solutions including unit investment trusts (UITs).

**We believe three important factors distinguish AAM from other UIT sponsors:**

1. Experienced Team and Growing Network of Strategic Relationships 2. Innovation 3. Personalized Service and Ongoing Support

## Experienced Team and Growing Network of Strategic Relationships

AAM employs a highly experienced UIT team of over 10 professionals, many of whom have spent over two decades in the UIT industry. AAM's investment professionals handle the security selection on many of our UITs and we partner with select investment management firms we believe have unique approaches. Their proven investment processes have the potential to add value to investor portfolios because these managers primarily serve institutional clients that are not otherwise available to advisors and individual investors.



NAVELLIER / Dial Capital Management, LLC.  
*Calculated Investing*



# What Distinguishes an **AAM** UIT?

## Innovation

AAM has a rich history of delivering innovative, timely UIT solutions, even in volatile market conditions including a reinvention of fixed income UITs, the launch of a broadly diversified equity portfolio, and covered call portfolios using LEAPS®.

- AAM launched the **High 50® Dividend Strategy** specifically to address what we viewed as the shortcomings of the “Dogs of the Dow” by broadly diversifying each trust by security, sector and potentially market capitalization.
- AAM partnered with Cyrus J. Lawrence (CJL) to offer the **Bulldog Portfolio** which included companies that meets its own “Bulldog” criteria developed over 20 years ago. CJL believes these bulldog companies have the potential to take advantage of the current global economic landscape because of their aggressiveness in taking and defending market share in growing industries.
- AAM reinvented traditional fixed income UITs by lowering sales charges and expenses in an effort to make them more competitive with individual bonds. With a single-ticket purchase, this structure allows investors to own a diversified, professionally selected portfolio that can provide monthly income with a low minimum purchase amount. Several UIT sponsors have since changed their pricing structure to mimic AAM’s.
- By directly holding Long Term Equity Anticipation Securities (LEAPS®) in select AAM covered call UITs, we have reduced expenses in an effort to potentially improve client performance.

## Personalized Service and Ongoing Support

AAM is well-equipped to provide unmatched service and support to our clients. Our wide array of financial tools, leading technologies and industry expertise are what set us apart. We offer investment solutions for varying market conditions and investor objectives.

We also provide timely **commentary** and **market insights** from our own intellectual capital, as well as from our partner firms.

*For more information please contact your financial professional or visit Advisors Asset Management online at [www.aamlive.com](http://www.aamlive.com).*

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Unit Investment Trusts (UITs) are sold only by prospectus. You should consider the trust’s investment objectives, risks, charges and expenses carefully before investing. Contact your financial professional or visit Advisors Asset Management online at [www.aamlive.com/uit](http://www.aamlive.com/uit) to obtain a prospectus, which contains this and other information about the trust. Read it carefully before you invest.

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