

## KEEP PORTFOLIOS IN BALANCE WITH JENNISON MULTI-STRATEGY PORTFOLIOS

- Do you have clients who (still) have too much growth in their portfolios because they're waiting for the big comeback?
- Do you have clients with too much value in their portfolios because it's the "in" style?
- Are you having a hard time explaining the value of taking a balanced approach to investing?

### Your opportunity

Remember how difficult it was in 1999 to get clients to sell large-cap growth (which was racking up enormous returns) and rebalance? The Jennison Multi-Strategy Portfolios available in MACS and PIIMA help eliminate that problem.

There are two multi-strategy portfolios to choose from. The first is an all equity portfolio, which generally will be split between large-cap growth and large-cap value stocks but may, at the discretion of the portfolio manager, shift to 40%: 60% in favor of any one style versus the other.

The second is a balanced portfolio that contains large-cap growth stocks, large-cap value stocks, and fixed income securities. In addition to the high-end benefits of an individually managed account, your clients benefit from:

- Diversification with more than one asset class to help reduce risk.
- Portfolios that can be rebalanced to meet changing market conditions.
- Overlay management feature allowing portfolios to stay in balance by adjusting for market performance, eliminating overlapping positions, and avoiding wash sales.
- Multiple portfolios in a single individually managed account, one consolidated statement, and leading money managers—all for a minimum investment of \$100,000.

### NEXT STEPS

- Make a list of suitable affluent clients and desirable prospects whose investments are overweighted in growth, value, or cash, and are unwilling to commit a large amount of money to open a traditional individually managed account.
- Show them how they can use a portion of their money to help rebalance their investments, gain the advantages of a managed account, and reduce volatility through diversification.
- Describe how growth and value investments often outperform at different times, and how the Jennison Multi-Strategy Portfolios address that situation by including both styles.
- For investors still unwilling to make a significant commitment to equity, discuss the advantages of the Jennison Multi-Strategy Balanced Portfolio, which includes a 40% fixed income component.

Professional money management may not be suitable for all investors. Investment advisory products and services are offered through Pruco Securities Corporation, 751 Broad Street, Newark, NJ 07102-3777 and Prudential Securities Incorporated, 199 Water Street, New York, NY 10292. Both are Prudential Financial companies. Prudential Financial is a service mark of The Prudential Insurance Company of America, Newark, NJ, and its affiliates.

For Financial Professional Use Only.

IFS-A078876 NS01701

## LET JENNISON MULTI-STRATEGY PORTFOLIOS BOOST BUSINESS

With the estimated size of the rollover market topping more than \$300 billion by 2005 and the average 401(k) rollover being \$160,000, conditions couldn't be better for you to build your book with the Jennison Multi-Strategy Portfolios.

### Your opportunity

With the Jennison Multi-Strategy Portfolios available in MACS and PIIMA, you can service your suitable clients' retirement accounts efficiently and provide diversification. Specifically, your suitable clients can benefit from:

- Attractive investment minimum. Unlike many other individually managed accounts that require substantially higher initial investments, it only takes \$100,000 to open a Jennison Multi-Strategy Portfolio.
- Diversification. Clients can diversify across asset classes and investment styles. We offer an all-equity, large-cap value and large-cap growth portfolio or a balanced portfolio featuring fixed income, large-cap value, and large-cap growth stocks.
- Overlay management. A lead money manager coordinates investment activity across the portfolios to help prevent style bets, duplication of positions, and wash sales.
- Control. Because this is an individually managed account, clients have more input into shaping their portfolios for tax or growth purposes.
- Simplified performance tracking. One account, one consolidated statement, and one performance number allow clients to monitor the progress of their investments quickly.

Professional money management may not be suitable for all investors. Investment advisory products and services are offered through Pruco Securities Corporation, 751 Broad Street, Newark, NJ 07102-3777 and Prudential Securities Incorporated, 199 Water Street, New York, NY 10292. Both are Prudential Financial companies. Prudential Financial is a service mark of The Prudential Insurance Company of America, Newark, NJ, and its affiliates.

For Financial Professional Use Only.

IFS-A078878 NS01701

### NEXT STEPS

- Target audiences for the Jennison Multi-Strategy Portfolios can include:
  - Clients/prospects who are recently retired or are separated from their employers and have a large rollover decision.
  - Clients and prospects who could benefit from asset allocation in an individually managed account, but whose assets were previously "too low."
  - Clients and prospects who know they need additional diversification in their current portfolio, but are afraid to make a change.
- Scan your local papers and visit [HRLive.com](http://HRLive.com) for news of corporate downsizing or restructuring that may lead you to rollover prospects.
- Schedule client seminars featuring the *Rollovers: Know Your Options, Plan Your Strategy* presentation (PRU1335).