Miles Wealth Management Group | RAYMOND JAMES®

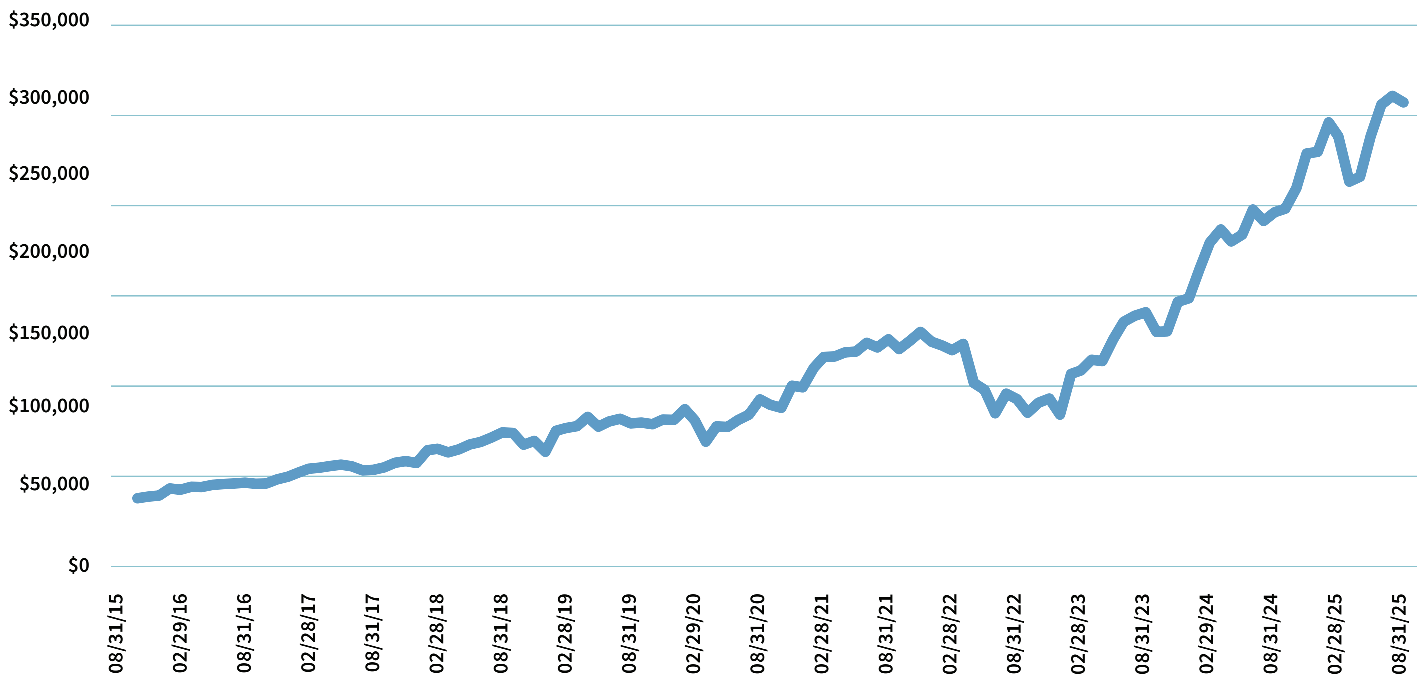
TFSA Model Portfolio

Investment Objectives

The portfolio's investment objective is long-term capital appreciation. The portfolio seeks to achieve its investment objectives by investing in individual stocks and ETFs. The portfolio follows parameters that have been defined through our proprietary investment process using Morningstar and Inovestor.

Portfolio Details

- **SENIOR WEALTH ADVISOR & SENIOR PORTFOLIO MANAGER**
  Benji Miles, CIM®, CFP®
- **EQUITY RESEARCH**
  Morningstar/Inovestor
- **ACCOUNT TYPE**
  Portfolio Managed Account
- **INCEPTION DATE**
  October 13, 2015



TIMEFRAME	3MTH	YTD	1 YR	3 YTR	5 YR	7 YR	SI*
NET ANNUALIZED RETURNS	7.85%	9.14%	27.88%	34.87%	17.52%	13.54%	14.38%

*Since Inception Date 10/13/2015

Model portfolio performance returns are as of 08/31/2025 and are based on an actual representative account. Please note that past performance is not necessarily an indicator of future performance. The indicated rates of return are gross of fees and/or commissions. Individual results of client portfolios may differ from that of the representative portfolio as fees may differ, and performance of specific accounts is based on specific account investiture. The noted representative portfolio may not be appropriate for all investors.