

# Featured model portfolios by goal

Tool methodology  
As of March 2024

BlackRock’s “Featured Model Portfolios by Goal” experience (the “tool”) is designed to help financial professionals learn about BlackRock model portfolios that may help their clients meet their financial goals. The tool filters a universe of more than 120 BlackRock model portfolios into a smaller selection through the lens of common investment goals (growth, income, capital preservation) and product preferences (ETFs, mutual funds, sustainable, SMAs, tax-aware). BlackRock model portfolios with only hypothetical performance track records are excluded. In addition, the tool does not contain any third-party branded or BlackRock model portfolios that are provided by BlackRock exclusively to applicable platform users (collectively, “custom model portfolios”). To obtain information on custom model portfolios, please contact BlackRock’s Model Specialists at 1-877-275-1255. To view all BlackRock model portfolios, financial professionals should visit Model Evaluator.

As many factors could influence a decision about which product is appropriate for a given investment goal, this information should not be relied upon exclusively when evaluating various investment options. Categories are for illustrative purposes only and do not represent all possible investor goals. The BlackRock model portfolios shown are intended to illustrate possible model portfolios to consider. This information should not be relied upon as research, investment advice, or a recommendation regarding any products, strategies, model portfolios, or security in particular. Any model portfolio selection is category-driven and is not tailored to the investment objectives or needs of any particular investor. Investors should consult with their financial professionals prior to making an investment decision.

The table below describes the criteria used to generate the model portfolios displayed in each category. As of March 2023. BlackRock model portfolios offered after this date are not displayed in the tool. The tool is generally updated semi-annually.

<b>Growth</b> Models with a target equity allocation of 31% to 100% and pursue a growth outcome orientation.	
<b>All ETF</b>	Model portfolios that pursue growth as defined above and must include only ETFs. Model portfolios may also include allocations to cash. To align with a “growth” goal, the category excludes models whose primary objective is to generate income. Model portfolios with a tax-aware approach are excluded. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.
<b>Mutual fund &amp; ETF</b>	Model portfolios that pursue growth as defined above and must include only Mutual Funds & ETFs. Model portfolios may also include allocations to cash. To align with a “growth” goal, the category excludes models that state their primary objective is to generate income. Model portfolios with a tax-aware approach are excluded. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.

<b>Tax-aware</b>	Model portfolios that pursue growth as defined above and have a tax-aware approach. To align with a “growth” goal, the category excludes models who state their primary objective is to generate income. Frequent trading could trigger a taxable event, so the models generally rebalance no more than 3x times a year
<b>Sustainable</b>	Model portfolios that pursue growth as defined above and integrate a focus on sustainable / ESG outcomes using ETFs. Model portfolios may also include allocations to cash. To align with a “growth” goal, the category excludes models who state their primary objective is to generate income. Model portfolios with a tax-aware approach are excluded. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.
<b>High net worth</b>	Model portfolios that pursue growth as defined above and must include ETFs and SMAs. Model portfolios may also include allocations to cash. To align with a “growth” goal, the category excludes models who state their primary objective is to generate income. Models in the “high-net worth” category are typically offered at significantly higher account minimums. The models typically rebalance 2-6 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.
<b>Income</b> Models with a target equity allocation of 0% to 79% and pursue income generation.	
<b>All ETF</b>	Model portfolios that primarily pursue income potential and must include only ETFs. Model portfolios may also include allocations to cash. Model portfolios with a tax-aware approach are excluded. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.
<b>Mutual fund &amp; ETF</b>	Model portfolios that primarily pursue income potential and must include only Mutual Funds & ETFs. Model portfolios may also include allocations to cash. Model portfolios with a tax-aware approach are excluded. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.
<b>Tax-aware</b>	Model portfolios that primarily pursue income potential and must include only Mutual Funds & ETFs. Model portfolios may also include allocations to cash. These model portfolios have a tax-aware approach. Frequent trading could trigger a taxable event, so the models generally rebalance no more than 4x times a year.
<b>Capital Preservation</b> Models with a target equity allocation of 0% to 31% and pursue capital preservation.	
<b>All ETF</b>	Model portfolios that pursue capital preservation, must include only ETFs. Model portfolios may also include allocations to cash. Model portfolios with a tax-aware approach are excluded. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.
<b>Mutual fund &amp; ETF</b>	Model portfolios that pursue capital preservation, must include only Mutual Funds & ETFs. Model portfolios may also include allocations to cash. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.

<b>Tax-aware</b>	Model portfolios that pursue capital preservation, may include Mutual Funds, ETFs, and/or SMAs. Model portfolios may also include allocations to cash. These models have a tax-aware approach.
<b>Sustainable</b>	Model portfolios that pursue capital preservation and integrating sustainable / ESG outcomes using ETFs. Model portfolios may also include allocations to cash. Model portfolios with a tax-aware approach are excluded. The models typically rebalance at least 4 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.
<b>High net worth</b>	Model portfolios that pursue capital preservation, must include ETFs and SMAs. Model portfolios may also include allocations to cash. Models in the “high-net worth” category are typically offered at significantly higher account minimums. The models typically rebalance 2-6 times a year or more to help adapt to changing market conditions and attempt to deliver target market exposures over time.

**To learn more or access the tool visit:** [blackrock.com/models](https://blackrock.com/models)