Diversified GROWTH

A CARSON INSTITUTIONAL STRATEGY

CARSON INSTITUTIONAL ALLIANCE

OBJECTIVE

- Proactive management
- Growth objective over a full market cycle
- Themes-based strategy

STRAIGHTFORWARD COMMUNICATIONS

✓ Trade Notifications
✓ Weekly Market Commentary
✓ Monthly Investment Outlook
✓ Quarterly Market Videos

REDUCING INVESTMENT COST BARRIERS

Diversified Growth is designed for a portion of a client's portfolio seeking strategic allocation in a multiple manager approach. The objective is to provide returns over a full market cycle without the transaction costs that typically erode returns in lower balance accounts.

- Ability to invest accounts in an actively managed strategy with no transaction costs and virtually no account minimum
- Designed for someone that seeks lower portfolio turnover than many other strategies
- We believe that proactive management may outperform passive strategies
- Strategy looks to capture long-term gains over a full market cycle

"Buy and Hold" as an investment strategy is dead.

INVESTMENT PROCESS

1

Develop Investment Themes:

The Investment Committee identifies themes based on long-term trends in the market. Portfolio manager creates portfolios based on asset and sector classes believed to be in a long-term trend, as identified by the Investment Committee.

2

Analyze Investment Options:

Portfolio manager searches for optimal funds to invest in which focus on providing alpha over extended time periods, have a long-term track record of performance in up and down markets, are mindful of cost and expenses and also complete an analysis of underlying holdings.

3

Monitoring:

Portfolio managers continually monitor investment process. They monitor investment behavior trends identified in step one for changes and new trends in the market, while continuing to monitor fund managers.

INVESTMENT OBJECTIVE

- Investment Horizon: Minimum of 3 Years
- Investment Minimum: $1,000
- Benchmark: S&P 500 PR
- Investment Objective: Growth

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