

## 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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