

OBJECTIVE

- All stock portfolio
- Driven by fundamental research
- Identifies undervalued opportunities
- Positioned to potentially benefit from secular trends

STRAIGHTFORWARD COMMUNICATIONS

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

BUYING FOR THE LONG TERM

LongTerm Trend seeks growth over longer time horizons and is a good match for investors who are patient and willing to tolerate periods of volatility. Stock positions will be sold if they become significantly over-valued or if the fundamental picture has considerably changed. Clients with long-term investment horizons (minimum of 5 years) historically benefit from LongTerm Trend. This strategy is an all-stock portfolio that is closely monitored and managed by an in-house team of experienced research analysts.

- Identifies firms with competitive advantages that may last for years to come
- Fundamental research conducted by internal team of analysts
- "Buy and Monitor" philosophy, actively involved in company updates

"All there is to investing is picking good stocks at good times and staying with them as long as they remain good companies." – WARREN BUFFETT

INVESTMENT PROCESS



INVESTMENT OBJECTIVE

- Investment Horizon: Minimum of 5 Years
- Investment Minimum: \$25,000
- Benchmark: S&P 500 PR
- Investment Objective: Growth

No strategy assures success or protects against loss. This information is presented as an introduction to the portfolio strategy and for educational purposes. As such, it is not intended as a solicitation or offer. Prospective investors should contact his/her advisor for more detailed portfolio information and the product's suitability in meeting your financial investment objectives.

Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will either be suitable or profitable for a client or prospective client's investment portfolio. This content cannot be copied without express written consent of CWM, LLC.

Carson Institutional Alliance

13321 California Street
Dodge Plaza, First Floor
Omaha, NE 68154

toll free 888.321.0808

fax 402.330.1668

carsoninstitutional.com