

*We offer customized portfolios organized around what each solution is built to accomplish
Income Generation, Capital Appreciation, or Tax Awareness.*

INCOME GENERATION SOLUTIONS

STOCKS

- Tactical Growers
- Momentum Players
- Bottom Pickers

ETFs

- W.I.R.E. Solution

ADVANCED STRATEGIES

- Protective Puts
- Private Equity

CAPITAL APPRECIATION SOLUTIONS

STOCKS

- Quality Tax Alpha

ETFs

- Municipal Income

ADVANCED STRATEGIES

- Option Collar
- Private Real Estate

TAX AWARE SOLUTIONS

STOCKS

- Cyclical Income

ETFs

- Defensive Income
- Fixed Income

ADVANCED STRATEGIES

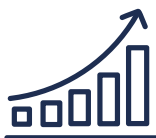
- Covered Call
- Private Credit

Our Portfolio Construction



Income Generation

Turning what you already own into a consistent, reliable source of cash flow.



Capital Appreciation

Actively hunting for the market's next source of capital appreciation



Tax Awareness

Smart positioning today to minimize the drag of taxes tomorrow.