

Our in-house investment solutions are built around you. We design, manage, and monitor every portfolio internally using proprietary strategies to fit your plan.

Designing Your Portfolio

 Core Portfolio Foundational investment strategies for all risk profiles: • Exchange traded funds (ETFs) • Equity & fixed income holdings • Low-cost investments	 Individual Stocks Stock portfolios with various objectives and investment criteria: • Value, Dividend & Growth portfolios • Targeted exposure to specific companies • Opportunity for tax management
 Focused Opportunities Portfolio strategy utilizing stocks or ETFs based on current market environment: • Concentration in high-conviction areas • Increased diversification across industries • Capitalize on shifting market trends	 Advanced Strategies Customized investment solutions centered around income & protection: • Options contracts • Private credit & equity • Tax-exempt & taxable bond strategies

Investment Strategy Guidelines

Portfolio	# of Holdings	Account Minimum	Risk Profile
Core Portfolio	10 to 20	\$10,000	Preservation - Aggressive
Individual Stocks	15 to 45	\$100,000	Conservative - Aggressive
Focused Opportunities	8 to 12	\$500,000	Moderate - Aggressive
Advanced Strategies	Various	\$1,000,000	Moderate - Aggressive

Important Disclosures: This information is for educational and informational purposes only and should not be construed as personalized investment advice. Investing involves risk, including the potential loss of principal. All investments carry risk, and diversification or asset allocation does not ensure a profit or protect against loss in declining markets. References to strategies are provided for illustrative purposes only and do not constitute investment advice or a recommendation by EWM. Not all investment strategies are suitable for every investor. Each client's portfolio is designed to align with their individual financial objectives, risk tolerance, time horizon, and liquidity needs. EWM evaluates each client's circumstances to determine the appropriateness of any particular investment strategy.