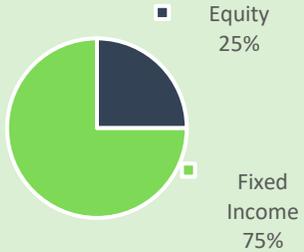
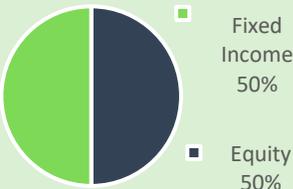
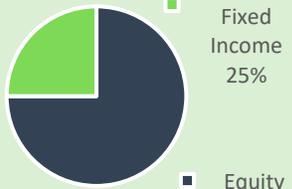




## ASSET SUMMARY

At Econ Wealth Management our niche is working actively to research and select investments on your behalf. We work diligently to identify investments that, in our opinion, are appropriate to the goals of your plan. We also believe that using investments with low annual expense ratios (individual stocks and the exchange traded funds (ETFs)) is of utmost importance. In working to achieve the most beneficial blend of investments for your portfolio, specifically based on your plan, we have updated our Investment Selection Process (ISP). While the foundation of our portfolios are ETFs, we incorporate the ability to own individual stock holdings, granted it is appropriate for your risk, goals, and financial plan. Following is our 2022 menu of offerings that we utilize to tailor to the needs of our clients based on risk tolerance, financial goals, and income needs.

## INVESTMENT OFFERINGS

	CONSERVATIVE ALLOCATION	BALANCED ALLOCATION	GROWTH ALLOCATION
	<p><b>Conservative</b></p>  <p>Equity 25%</p> <p>Fixed Income 75%</p> <p>■ Equity ■ Fixed Income</p>	<p><b>Balanced</b></p>  <p>Fixed Income 50%</p> <p>Equity 50%</p> <p>■ Equity ■ Fixed Income</p>	<p><b>Growth</b></p>  <p>Fixed Income 25%</p> <p>Equity 75%</p> <p>■ Equity ■ Fixed Income</p>
<b>Core</b>	<b>25-50% Equity &amp; 50-75% Fixed Income</b>	<b>50-75% Equity &amp; 25-50% Fixed Income</b>	<b>75-100% Equity &amp; 0-25% Fixed Income</b>
	Our Conservative Allocation provides less risky investors a concentration in fixed income with the opportunity for conservative growth through limited equity positions.	Our Balanced Allocation provides a slightly higher weighting of equity than fixed income. It offers ability to own a smaller total number of holdings that are selected to be strategically diversified.	Our Growth Allocation is for riskier investors and consists of a smaller total number of holdings that are heavily weighted in equity positions with limited exposure to fixed income.
<b>Strategic</b>	<b>20-50% Equity &amp; 50-80% Fixed Income</b>	<b>50-70% Equity &amp; 30-50% Fixed Income</b>	<b>70-100% Equity &amp; 0-30% Fixed Income</b>
	This solution is designed for investors with a lower-level risk tolerance who prefer less volatility while accepting the potential of lower returns compared to equity portfolios.	This solution is intended to provide a moderate level of risk and return over time. It will seek higher equity exposure than a Conservative portfolio and more in fixed income than a Growth portfolio.	This solution is best suited for clients who are seeking a greater return and are willing to take on higher levels of risk, typically with a longer investment time horizon.

## TACTICAL PORTFOLIOS

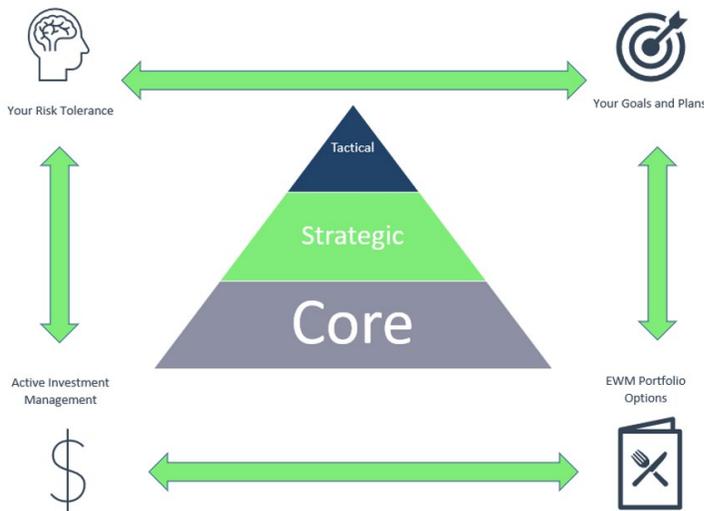
BALANCED ALLOCATION	MANAGED GROWTH	CAPITAL APPRECIATION
<b>30-60% Equity &amp; 40-70% Fixed Income</b>	<b>50-70% Equity &amp; 30-50% Fixed Income</b>	<b>70-100% Equity &amp; 0-30% Fixed Income</b>
This product offering is designed for high valued accounts who fit our Moderately Conservative risk profile and would like a more tactical and active management style.	This product offering is designed for high net worth accounts who fit our Moderate risk profile and would benefit from an individualized portfolio.	This solution offers a specific focus of equity holdings that are tactical in nature for the riskiest of high net worth accounts.

# EWM INVESTMENT SELECTION PROCESS

Our Investment Selection Process is both disciplined and active and focuses on minimizing undue risk and volatility while optimizing potential real return and seeking consistent performance.



# ACTIVE MANAGEMENT OF YOUR ASSETS



We use a team approach to help clients build and maintain wealth through investment strategies based on individual needs.

## IMPORTANT DISCLOSURES

Information presented is believed to be factual and up to date, but we do not guarantee its accuracy and it should not be regarded as a complete analysis of the subjects discussed. All expressions of opinion reflect the judgment of the author/presenter as of the date of publication and are subject to change and do not constitute personalized investment advice. A professional advisor should be consulted before implementing any investment strategy. Investments are subject to market risks and potential loss of principal invested, and all investment strategies likewise have the potential for profit or loss. Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment or strategy will be suitable or profitable for a client's portfolio. All investment strategies have the potential for profit or loss. The information presented herein is intended for educational purposes only and is in no way intended to be interpreted as investment advice. Any charts, graphs, or visual aids presented herein are intended to demonstrate concepts. These visual aids should not in any way be interpreted as a device with which to ascertain investment decisions or an investment approach. ETFs (Exchange Traded Funds) are product offerings that have characteristics of risk and a structure that may cause volatility relative to the underlying securities held. Please be fully informed of these risks by speaking to your advisor and how they may apply to your portfolio or situation. Technical Analysis is a form of research that cannot guarantee any sort of outcome. EWM considers this a form that is any better than any other sort of due diligence including Fundamental Analysis. Do not consider this video to be a solicitation to buy or sell any security or investment.