






Tactical Portfolio Guide

FUND SUMMARY

AS OF MARCH 2022

Our Tactical Portfolios are designed for high monetary valued accounts whose risk tolerance is Moderate Conservative or riskier. Our Balanced Allocation, Managed Growth, and Capital Appreciation portfolios offer ranges of equity and fixed income that are composed of a Strategic Portfolio base as well as additional tactical positions that meet at least one of the following criteria: tactical trading, risk management, tax considerations, advanced strategies, accessible cash, individual security management. Each account consists of a personalized allocation that aims to meet specific goals and needs for the client. The main objectives of these offerings are consistent with our Strategic Portfolios, income with growth and tactical positioning.

TACTICAL PORTFOLIO ALLOCATIONS

BALANCED ALLOCATION	MANAGED GROWTH	CAPITAL APPRECIATION
 <p>■ Equity ■ Fixed Income</p>	 <p>■ Equity ■ Fixed Income</p>	 <p>■ Equity ■ Fixed Income</p>
30-60% Equity & 40-70% Fixed Income	50-70% Equity & 30-50% Fixed Income	70-100% Equity & 0-30% Fixed Income
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 to Moderately Aggressive 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.

FUND STRATEGY

By utilizing proprietary technical analysis of the overall market by reviewing close to 70 charts of the different sectors and asset classes weekly as well as individual holding analysis performed daily, our Asset Management Team seeks additional tactical positioning in the form of individual stocks and Exchange Traded Funds (ETFs). Via our daily Investment Selection Process, transactional ideas are generated and reviewed in attempt to capture alpha by actively managing holdings while also offering the benefits of

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