

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

CAPITAL APPRECIATION SOLUTIONS

STOCKS

- Tactical Growth
- Momentum Growth
- Deep Value

ETFs

- W.I.R.E. Strategy

ADVANCED STRATEGIES

- Protective Puts
- Private Equity

TAX AWARE SOLUTIONS

STOCKS

- Dynamic Equity

ETFs

- Municipal Income

ADVANCED STRATEGIES

- Option Collar
- Private Real Estate

INCOME GENERATION SOLUTIONS

STOCKS

- Dividend Income

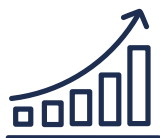
ETFs

- Flexible Income
- Core Income

ADVANCED STRATEGIES

- Covered Call
- Private Credit

Our Portfolio Construction



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.



Income Generation

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

IMPORTANT DISCLOSURES: This material is provided for informational and educational purposes only and is not intended as individualized investment, tax, or legal advice. The strategies shown are examples of investment approaches that may be utilized by Econ Wealth Management and may not be appropriate or available for every client. Investing involves risk, including the possible loss of principal. No investment strategy can guarantee income, capital appreciation, tax efficiency, or positive investment results. Strategies involving options and alternative or private investments may involve additional risks, including liquidity, market, credit, valuation, concentration, and other risks, and may be appropriate only for certain investors. References to tax efficiency or tax-aware strategies do not guarantee any particular tax result.