TWM Capital

OVERVIEW

TWM Capital is a specialized strategy which uses the expertise of our Investment Policy Committee to allocate money to selected asset classes.

MANAGEMENT STYLE: Conservative ☐ ☐ ■ ☐ ☐ Aggressive

OBJECTIVE

The strategy applies a low volatility approach, using the consensus-based asset allocation parameters of the Tuttle Wealth Management Investment Policy Committee to create a mix of stock, bond, real estate, and commodity funds.

STRATEGY

This model is actively managed with a goal towards long term growth but low volatility is the overriding factor.

Investments are selected using a proprietary process which continually measures market cycles and trends. Money is then allocated to selected ETFs and Index Funds based on a number of proprietary factors. This portfolio strategy can be funded with qualified or non-qualified money.

CRITERIA

General allocations for the TWM Capital Strategy:

Stocks	**0 – 100%**
Bonds	**0 – 100%**
Commodities	**0 – 25%**
REITs	**0 – 100%**
Cash / Money Market	**0 – 100%**

DEFENSIVE OPTION

In times of market uncertainty or high risk, assets can be moved to money market funds.

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