



OVERVIEW

This specialized moderately aggressively growth strategy allocates money across a variety of domestic and international equity markets. Returns are pursued through a blend of style and sector investing using style-specific mutual funds, broad index funds, sector funds, and ETFs.

MANAGEMENT STYLE: Conservative **Aggressive**

OBJECTIVE

The portfolio strives to build assets by outperforming the general market through specific fund selection (style and sector) and trend monitoring. *Designed for assets not needed for 5 years or longer.* TWM Core Tactical can experience more volatility along with greater potential, and has the flexibility to move any or all assets to cash (money market) in times of high market turmoil.

STRATEGY

This strategy is based on identifying the strongest trend within the major style classes, the best performing general market sectors, and the top 4 – 6 outperforming specific sectors, domestic or international. This is a highly active strategy; assets are allocated to reflect the best risk / reward trading opportunities over a time period of a few weeks to a few months. For non-qualified assets, tax impact concerns are secondary to growth. During times of high uncertainty or market instability, conditions may require a 100% cash position.

CRITERIA

Investments are selected using a proprietary process that includes but is not limited to relative strength rankings, volatility and breadth studies, and specialized market basket creation. A VIX (volatility index) based proprietary risk overlay is used to determine increases in or decreases to market exposure. Money markets are used to hold cash during periods of uncertainty or economic downturn, if warranted.

TWM Core Tactical can be allocated across:

Style-specific Domestic & International Stocks
General Global Stocks
Top Market Sectors
Commodities (subsectors)

Cash

DEFENSIVE OPTION

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

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