



OVERVIEW

TWM All Weather is designed to provide core stability and modest returns through tactical allocations among recognized classic 'stronghold' investments, including bonds, stocks, real estate, commodities, and cash (money market).

MANAGEMENT STYLE: Conservative **Aggressive**

OBJECTIVE

The All Weather strategy seeks to preserve, then increase the value of invested principle, and targets annual returns of 8% after fees; regardless of market direction (although there can be no guarantee this strategy will meet its objectives).

STRATEGY

Tactical allocations are based on trend-following, counter-trend, and inter-market analysis. Designated stock indices are the S&P 500 and the NASDAQ. Up to 17% can be invested in the inverse ETFs of these indices. Other markets for this strategy are TIPS (Treasury Inflation Protected Securities) REITs (Real Estate Investment Trusts), commodities, and cash (money market). During periods of market turbulence or uncertainty, up to 100% may be positioned in cash.

CRITERIA

TWM All Weather Strategy allocations:

Commodities	0 – 17%
Stock Indices	0 – 17%
Inverse Stock Indices	0 – 17%
TIPS	0 – 17%
REITs	0 – 17%
Fixed Income	0 – 12%
Currencies	0 – 6%
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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