

OVERVIEW

The TWM IncomePlus Strategy uses a quantitative approach to actively manage a portfolio of high yield bond ETFs and / or mutual funds. This is our second most conservative strategy and is appropriate for income generation.

MANAGEMENT STYLE: Conservative ■ **Aggressive**

OBJECTIVE

TWM IncomePlus identifies and potentially capitalizes on both short and intermediate term price movements in high yield bonds; it can include dividend-paying stocks.

STRATEGY

The strategy uses intermediate trend analysis with strict risk controls to determine entry points into the high yield bond market. Assets not positioned in the market will be held in cash. The tactical nature of this strategy can result in extended periods of assets being 100% allocated to cash.

CRITERIA

Our approach includes applications for analyzing trends and systems, which in turn analyze markets which move in tandem or inversely to bonds.

DEFENSIVE OPTION

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

Tuttle Wealth Management, LLC

1 Stamford Plaza • 263 Tresser Boulevard • 9th Floor • Stamford, CT 06901

1-800-462-1655

mtuttle@tuttlewealth.com • www.tuttlewealth.com

This information should only be used by investors who understand the risks of investing. This information was compiled from sources believed to be reliable, but its accuracy cannot be guaranteed nor is every material fact represented. These strategies are investment strategies offered by Tuttle Wealth Management, LLC (TWM), an investment advisor registered with the U.S. Securities and Exchange Commission. TWM, its employees, clients, and associates often hold positions and invest in the recommended securities and may have had interest in past recommendations. No item should be construed as an offer to buy or sell securities.