

GCD Advisors, LLC

Prepared for
John Doe

Your Financial Journey

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YOUR FINANCIAL ANALYSIS

Your General Investing Goal

Investment Amount

\$ 85,000

Current Savings (Annual)

\$ 6,000

Current Age

41 Years

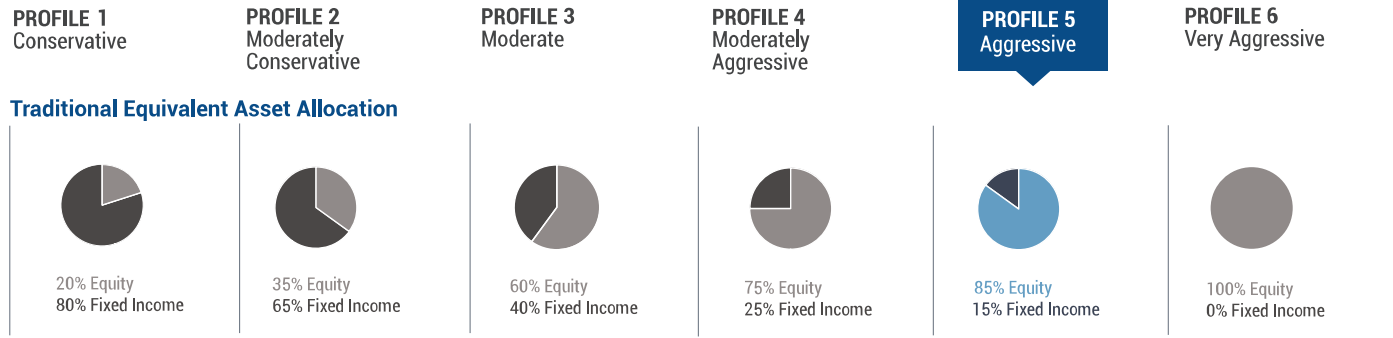
Target Amount

\$ 200,000

Your Risk Tolerance:

You have a focus on preservation of capital and wish to minimize downside risk.

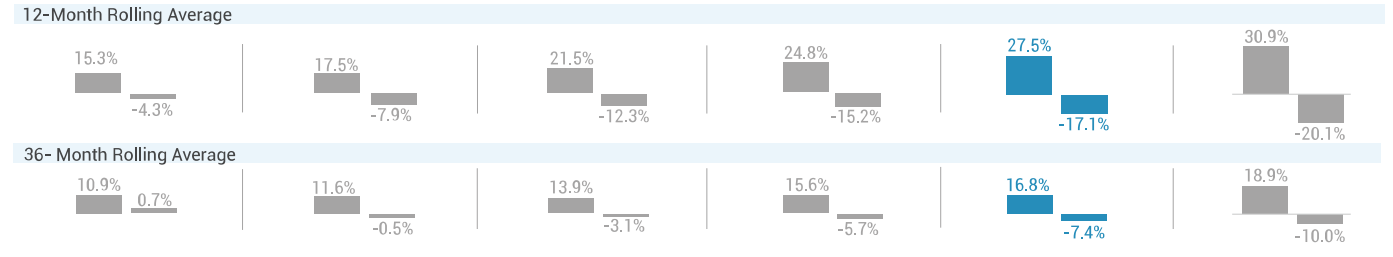
Risk Profile 5 Aggressive



Traditional Equivalent Asset Allocation

● Global Equity (MSCI All Country World Index) ● Global Fixed Income (Bloomberg Barclays Global Aggregate Bond Index)

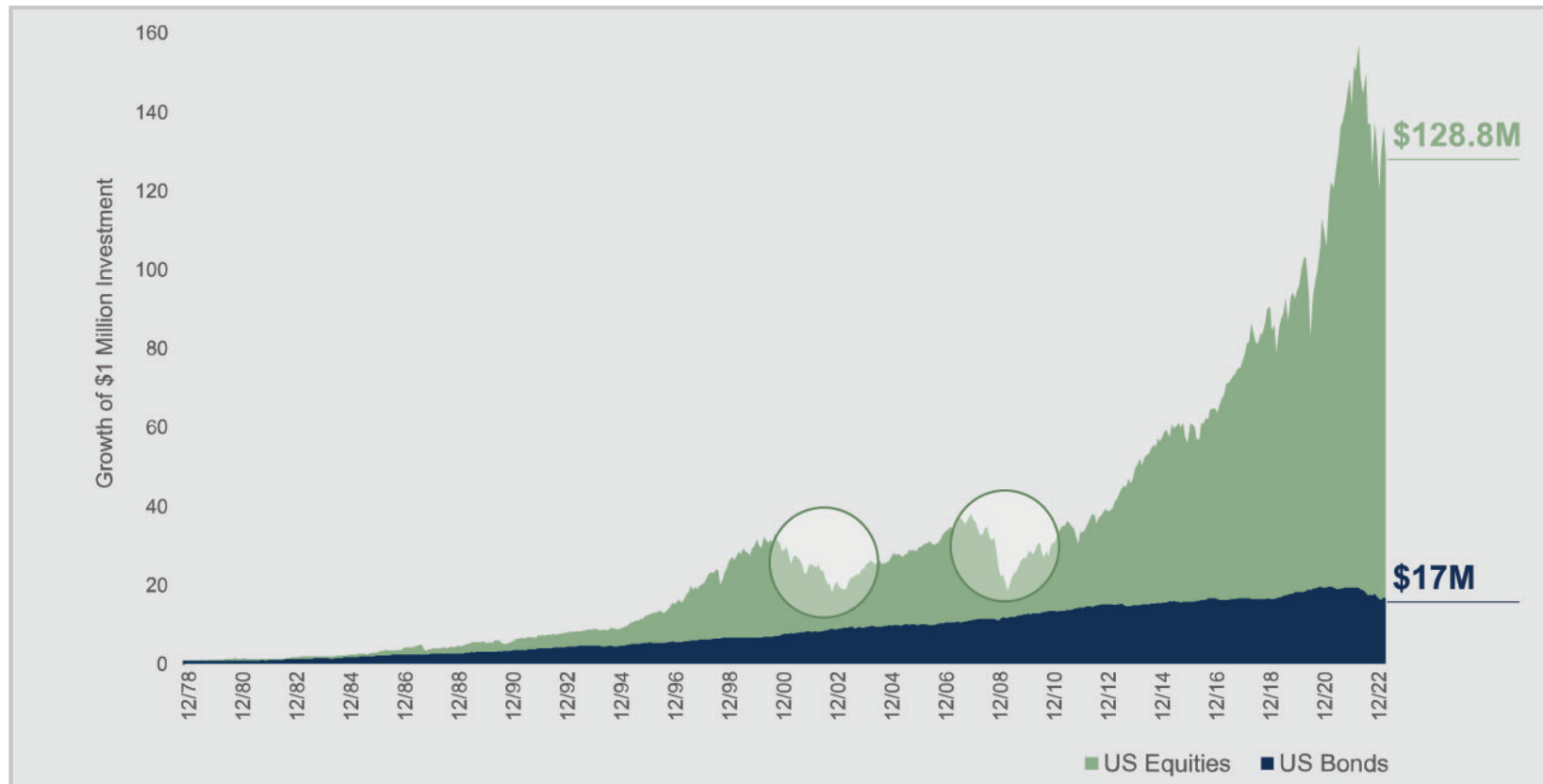
Best And Worst Returns By Rolling Time Periods



INVESTING IS PERSONAL

Importance of investing and diversification in your financial life - US Markets

Equities have been the best asset class for participating in long-term economic growth, but occasionally deliver nerve wracking declines

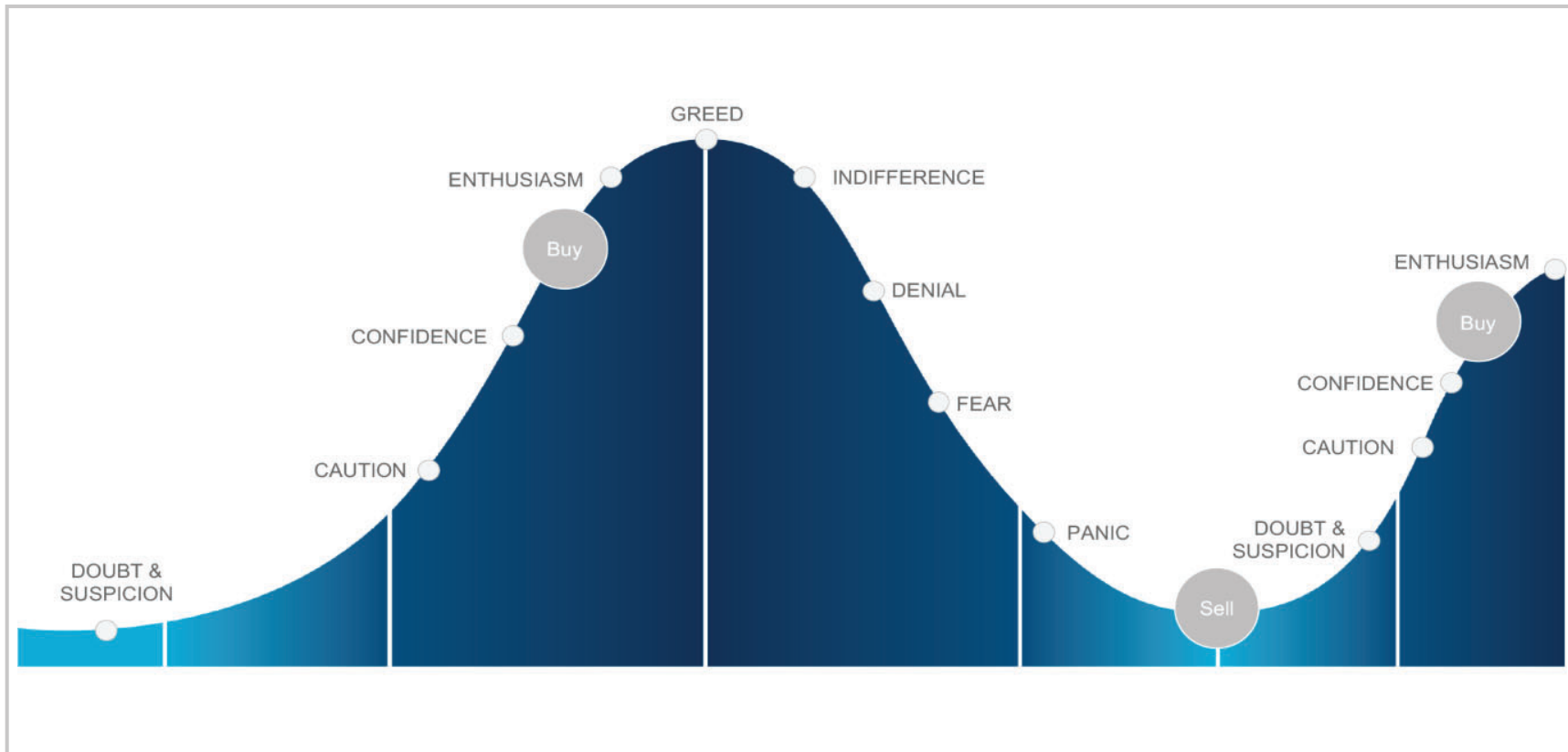


Charts are for illustrative purposes only. Past performance is no guarantee of future results. Investing involves risk, including the possible loss of principal, and there is no assurance that any investment strategy will be successful. One cannot invest directly in an index. Source: Zephyr Style Advisor. Data as of 12/31/2022. US Equities represented by S&P 500. US Bonds represented by the Bloomberg Barclays US Aggregate.

INVESTING IS PERSONAL

The Cycle of Emotions may impact investor decision-making

Which can shake investor's confidence, leading them to exit the market at the worst possible times, and to remain on the sidelines

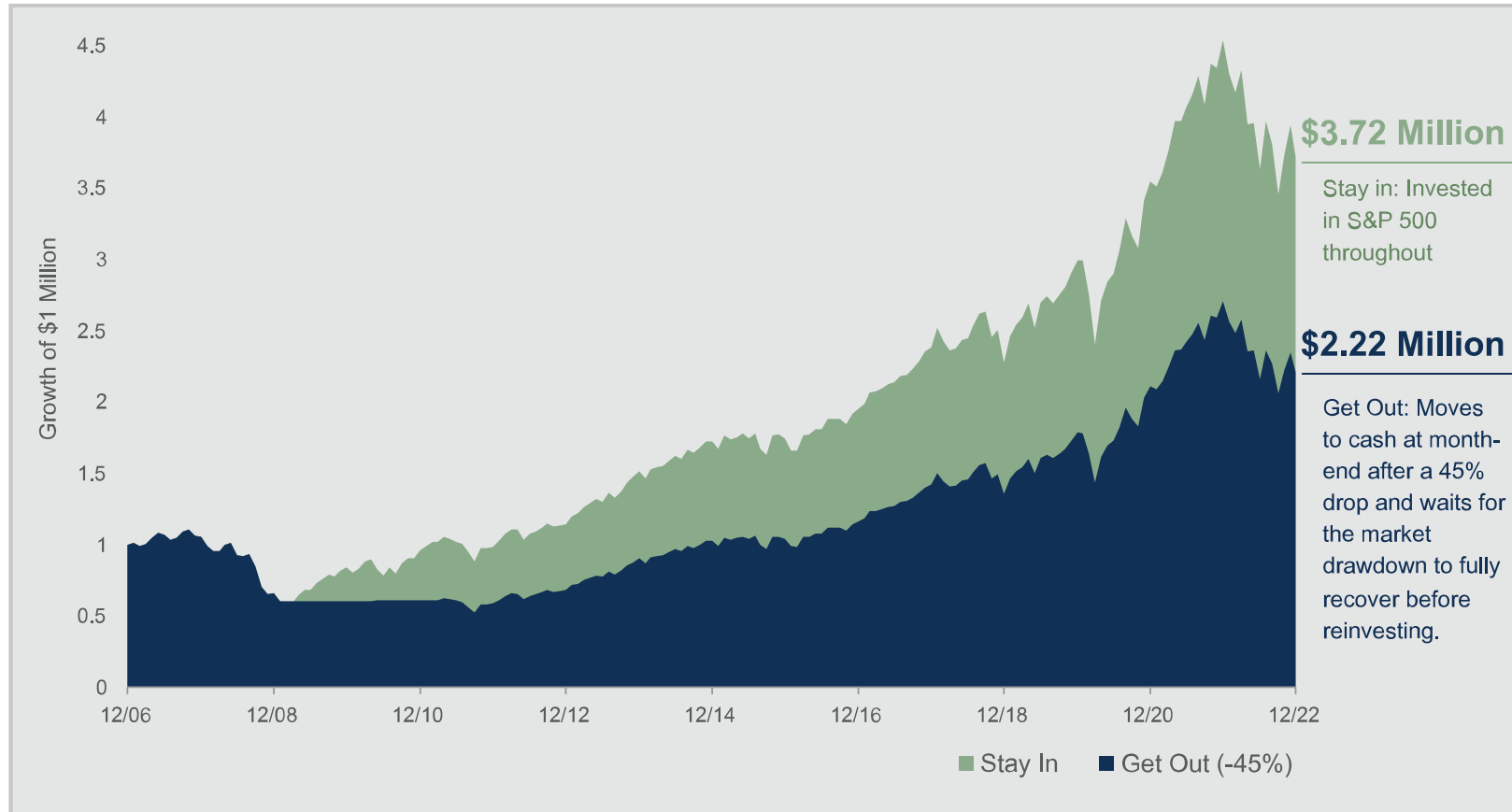


Source: "Quantitative Analysis of Investor Behavior, 2015," DALBAR, Inc. www.dalbar.com

INVESTING IS PERSONAL

Growth of \$1 million

Getting out at the wrong time – and waiting too long to return – may have damaging impacts on returns.



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Source: Zephyr Style Advisor. Data as of 12/31/2022. Stay In – Invested in S&P 500 throughout. Get Out (-45%) – Moves to cash at month end after a 45% drop and waits for the market drawdown to fully recover before reinvesting.

INVESTING EVOLVED

Investing Evolved was designed to allow more equity exposure in your portfolio with updated risk management techniques to provide a steadier experience during times of market stress.



Three Investment Approaches

- 1 Core markets**
provide exposure to growth in domestic and global economies.
- 2 Tactical strategies**
provide supplemental returns through active equity management.
- 3 Diversifying strategies**
help manage equity risk, particularly during times of steep market declines.

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IMPORTANT INFORMATION

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For more complete information about the various investment solutions available, including the investment objectives, risks and fees, please refer to the Disclosure Brochure and applicable Fund Prospectus. Please read them carefully before investing. For a copy, please contact your Financial Advisor.

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103728 | C22-18542 | 02/2022

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