

Wall Street Solutions with Main Street Values

INCOME NOW PORTFOLIO

We have created outcome based, proprietary investment models that are designed to pursue real life objectives. We build portfolios based on investor needs, which have a conservative bias and that can deliver impactful results.

Helping our clients properly manage market risk is our most important role. It's why we believe in a more dynamic, proactive approach to portfolio management. It's one that calls for strategic asset allocation, tactical overweighting and underweighting of each component, and short-term adjustments to each client's long-term strategy.

Income Now Portfolio: liquid and currently distributes 6% per anum (since 7/1/18)

Objective

Our Income Now Portfolio seeks a high rate of current income consistent with reduced risk. The portfolio expects to accomplish this by investing in a diversified group of non-correlated asset classes, targeted investment strategies and securities that generate income, are liquid and readily tradable on a daily basis.

Key facts

Asset Class/Market Cap:
Balanced/All Cap

Geographic Exposure:
Global

Benchmark:
MCSI World – 40.00%
BBG BC AGG – 60.00%

Investment strategy

This strategy utilizes our proprietary research techniques to find ETF and mutual fund solutions. Our Proprietary methodology and execution not only creates short-term investment opportunities within the portfolio but, more importantly, reduces the amount to risk taken. We also believe our thematic asset allocation tilts and active rebalancing will protect principal and add to the total portfolio return over the long-term.