



Tactical Dividend Portfolio

TARGET RETURN OBJECTIVE: 6-8%+

A tactically managed investment strategy from LifePro Asset Management.

Ready to take the next step?

Schedule a goal planning session with LifePro Asset Management.

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1-888-LIFEPRO

EMAIL

info@lifeproassetmanagement.com

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LifeProAssetManagement.com

A tactical strategy for growth-oriented investors that have a long-term mindset, but still want some income to complement their objectives.

The Dividend Portfolio offers investors an investment vehicle designed to seek out and invest in companies with simple and well-entrenched business models that have a strong and consistent track record of growing dividend payouts to investors over time. With a 6-8%+ target annual return objective, this strategy seeks returns above the S&P 500 Dividend Aristocrat Index and is tactically managed to navigate your account through all stages of the economic cycle.

Details and potential benefits of this portfolio:

- Employs a tactical investment strategy targeting 6-8%+ annualized returns.
- Combines top-down macro analysis with bottom-up fundamental company research.
- Averages between 30-40 holdings.
- Capable of hedging market exposure and going to 100% cash during bear markets.
- Advisory fee is flat and paid monthly.
- Complete control over account and can move at any time.

Seek a balance of growth and income.

The Tactical Dividend Portfolio is an absolute return investment discipline that combines asset allocation with sector and stock selection to target returns above the S&P 500 Dividend Aristocrat Index.



Configuration of Tactical Dividend Portfolio

- Technology: 24.13%
- Consumer Discretionary: 17.39%
- Industrials: 21.62%
- Financials: 15.97%
- Health Care: 18.05%
- Cash: 2.84%

Because the Tactical Dividend Portfolio is periodically adjusted to stay in line with your investment objectives, we use ranges to illustrate target allocations.

Structured to give you complete control.

LifePro Asset Management structures each portfolio to be completely accessible and transparent. You'll be able to track your investments in real-time and move the account elsewhere if you see fit.

	LPAM	Mutual Funds	ETF's
Ownership of securities	✓	✗	✗
Daily portfolio transparency	✓	✗	✓
Tax loss harvesting of investments	✓	✗	✗
Portfolio customization	✓	✗	✗
Transferability of underlying holdings	✓	✗	✗
Unwanted capital gains distributions	✗	✓	✗
Early redemption fees	✗	✓✗	✗
Back end loads	✗	✓	✗

Transparent fees

Product:

1.00%

Advisory:

1.00%

Charles Schwab:

as low as

\$4.95/trade

TD Ameritrade:

as low as

\$6.95/trade

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This information does not address individual situations and should not be construed or viewed as any type of individual or group recommendation. Be sure to first consult with a qualified financial adviser, tax professional, and/or legal counsel before implementing any securities, investments, or strategies discussed.

The S&P 500 Price Index is an unmanaged index of 500 widely held, predominantly large capitalization, U.S. exchange-listed common stocks. S&P Dividend Aristocrats Index includes 52 companies among the S&P 500 SPX, that have raised dividends each year for at least 25 years. The indices used by LifePro Asset Management allow for comparison of the investor's performance to that of certain well-known and widely recognized indices. Indices are typically not available for direct investment, are unmanaged and do not incur fees or expenses.

Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment or investment strategy (including those we recommend), will be profitable or equal any historical performance level(s). Stock market conditions vary from year to year, and can result in a decline in market value due to material market or economic conditions.

* Custodial trading fees are determined based on the election of paperless confirmations and statements. Clients who wish to receive paper documents will incur higher trading costs imposed by the custodian.