



Tactical Income Portfolio

TARGET RETURN OBJECTIVE: 4-6%+

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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A tactical strategy those investors seeking a prudent balance between desire for long-term growth and need for capital safety the short to medium term.

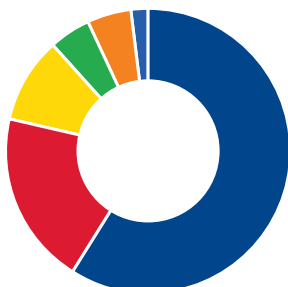
The Income Portfolio offers investors an investment vehicle designed to balance the risk that volatility and sequence of returns pose to accommodate short-term spending events. With a 4-6%+ target annual return objective, this strategy seeks to maintain your spending power and is tactically managed to navigate your account through all stages of the economic cycle.

Details and potential benefits of this portfolio:

- Employs a tactical investment strategy targeting 4-6%+ annualized returns.
- Composed of an equity component that invests in companies that have simple business models and a strong dividend growth profile.
- Risk averse portion maintains spending power while targeting returns above the investment grade bond market.
- Combines top-down macro analysis with bottom-up fundamental company research.
- Capable of hedging market exposure and going to 100% cash during bear markets.
- Complete control over account and can move at any time.

Seek a prudent balance of growth and safety.

The Tactical Income Portfolio is an absolute return investment discipline that combines asset allocation with sector, bond and stock selection to target returns above the blended benchmark of 50% S&P 500 Dividend Aristocrat Index/50% Bloomberg Barclays US Aggregate TR Index throughout all points of the business cycle.



Configuration of Tactical Income Portfolio

- Dividend Growth: 59.15%
- Low Duration Treasuries: 19.49%
- Floating Rate Bonds: 9.74%
- Investment Grade Bonds: 4.93%
- High Yield Corporate Bonds: 4.86%
- Cash: 1.83%

Because the Tactical Income 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.

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 S&P 500 Price Index is an unmanaged index of 500 widely held, predominantly large capitalization, U.S. exchange-listed common stocks. Bloomberg Barclays US Aggregate Bond Index is a market capitalization-weighted index used to represent investment grade bonds being traded in United States. The index includes treasuries, government-related and corporate securities, agency fixed-rate and hybrid adjustable rate mortgage pass-throughs and asset backed securities. 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.