



Tactical Opportunity Portfolio

TARGET RETURN OBJECTIVE: 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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LifeProAssetManagement.com

A tactical strategy for opportunistic investors that have a long-term mindset and are seeking an absolute return strategy.

The Opportunity Portfolio offers investors a minimal constraint investment vehicle designed to seek out and identify companies leading positive disruptive change and are positioned to capture market share in new and/or existing industries. With an 8%+ target annual return objective, this strategy seeks returns above the S&P 500 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 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 an absolute return strategy.

The Tactical Opportunity Portfolio is an absolute return investment discipline that combines asset allocation with sector and stock selection to target above-average market returns throughout all point of the business cycle.



Configuration of Tactical Opportunity Portfolio

- Technology: 31%
- Consumer Discretionary: 25%
- Industrials: 20%
- Financials: 14%
- Health Care: 10%

Because the Tactical Opportunity 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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The S&P 500 Price Index is an unmanaged index of 500 widely held, predominantly large capitalization, U.S. exchange-listed common stocks. 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.