



# Tactical Preservation Portfolio

**TARGET RETURN OBJECTIVE: 3-5%+**

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 for conservative investors that want to preserve capital first and do not require significant returns to meet their retirement goals.**

The Preservation Portfolio offers investors a conservative investment vehicle designed to minimize the risk that volatility and sequence of return risk can pose with short-term spending requirements. With a 3-5%+ target annual return objective, this strategy seeks to minimize investor exposure to any individual risk factor 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 3-5%+ annualized returns.
- Protects 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.
- Advisory fee is flat and paid monthly.
- Complete control over account and can move at any time.

# Seek a priority to preserve capital.

The Tactical Preservation Portfolio is an absolute return investment discipline that combines asset allocation with sector, bond and stock selection to target returns above the Bloomberg Barclays US Aggregate TR Index throughout all points of the business cycle.



## Configuration of Tactical Preservation Portfolio

- Government Bonds: 35%
- 7-10 Year Government Bonds: 10%
- Dividend Stocks: 25%
- Investment Grade Corporate Bonds: 10%
- High Yield Corporate Bonds: 20%

Because the Tactical Preservation 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%**

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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.

The above referenced "Product Fee" is in regard to the Tactical Opportunity Portfolio, a portfolio strategy, and not a mutual fund, ETF, or other product fee. Other transaction fees may apply as outlined by the custodian.