

High-Net-Worth Solutions

High-net-worth (HNW) clients often require an added level of customization and personalized service based on their specific needs. Dynamic specializes in evaluating complex client situations and finding simple solutions for HNW clients. In addition to building custom strategies which could include stocks, bonds, ETFs and alternative investments, we have a variety of unique products to meet specific client situations.

Best use scenario:
Alpha Generation

Private Equity

Access to private company investing

Stock SMA

Actively managed individual stock portfolios

Best use scenario:
Concentrated Stock Positions

Exchange Funds

Diversify concentrated stock positions with broad based indices for diversification and tax deferral benefits

Options

Custom options strategies with potential to limit downside and/or increase income generation

Best use scenario:
Corporate Retirement Solutions

Cash Balance Plan

Combination of a 401k plan & Defined Benefit Plan—fully fund a 401k plan and at least \$30K in a DBP annually

Defined Benefit Plan

Pre-tax contribution funded by a company for highly compensated individuals

Best use scenario:
Defensive Positioning

Hedge Funds

Typically utilize long and short positions to generate alpha regardless of market environment

Structured Notes

Utilize derivatives to track an index return while providing potential downside protection

Best use scenario:
Enhanced Borrowing Power

Pledged Asset Lending

Provides utilization of non-purpose loans

Best use scenario:
Income Generation

Individual Bond Ladders

Target individual bond maturities to align with distribution cycles while providing stable income generation

Private Credit

Access to private credit markets

Private Real Estate

Access to private real estate

Best use scenario:
Tax Optimization

1031 Exchange

Sell a real estate property and swap it for a new one of similar purpose to defer capital gains tax on the sale

Direct Indexing

Daily tax loss harvesting using individual stocks tracking an index, with a multitude of customization options (including ESG screens and factor tilting)

Individual State Specific Muni

Maximize tax benefit with state specific actively managed individual bond separately managed accounts

Qualified Opportunity Zones

Invest in government designated economically distressed communities where investment may be eligible for preferential tax treatment

For more information, visit

DynamicAdvisorSolutions.com/InvestmentManagement
or contact our team today at 877.257.3840, ext. 4 or
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Disclosure:

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Past performance is not a guarantee or a reliable indicator of future results. Investing in the markets is subject to certain risks including market, interest rate, issuer, credit and inflation risk; investments may be worth more or less than the original cost when redeemed.

Investment advisory services are offered through Dynamic Advisor Solutions, LLC, dba Dynamic Wealth Advisors, an SEC registered investment advisor.