Dynamic Strategies

We build portfolios for planners.

At Dynamic, we understand there are several ways advisors manage investments to meet various client needs. Different account types can utilize an array of investment selections based on risk, account size and type, tax sensitivity and many other factors.

Our goal is to provide a range of robust portfolio strategies that align with clients' long-term investment goals. To do that, we rely on a series of core strategy types that comprise various asset types that best represent our investment philosophy and process.

We put risk management first in strategically designing global, well diversified, balanced portfolios that are focused on the long-term. All strategies range from 100% to 30% equity in 10% increments.

Total Return ETF Strategies

The following broadly diversified portfolios focus on maximizing long-term risk adjusted returns:

Dynamic Core

Low-cost passive exposures with lighter portfolio tilts.

- 7-12 Holdings
- $25k Minimum
- 5-6 BPS Fund expenses

Dynamic Smart

Multi-factor (Smart Beta) equity exposures and actively managed fixed income with higher conviction portfolio tilts.

- 11-18 Holdings
- $150k Minimum
- 32-41 BPS Fund expenses

Dynamic Custom HNW

More personalized and customized portfolio management focused on high-net-worth clients' unique desired outcomes, including the potential utilization of ETFs, Stocks, Bonds and Alternative Investments.

- $2M Minimum per client

Objective Based ETF Strategies

The following broadly diversified portfolios focus on specific client objectives:

Dynamic Income

Higher yielding equities and fixed income to help clients with higher income needs. Generally, these strategies have the objective of yielding approximately double the income of broad based benchmarks and Dynamic's other models.

Dynamic Defensive

Buffered and lower risk holdings designed to hold up better in down markets for risk averse clients. Generally, these models have the objective of achieving approximately 15% to 20% lower risk than broad based benchmarks and Dynamic's other models.

Dynamic Tax Aware

Tax Aware strategies have an intentional focus on reducing the tax burden for tax sensitive clients through Dynamic's management. This includes allocations to tax-advantaged investments such as municipal bonds.

Unique Strategies

The following represent a wide variety of solutions to meet a multitude of potential investor situations:

Manager Specific
DFA (ETF and MF),
American Funds (MF)

Specific Use
ESG (ETF), Direct Indexing (Stocks),
Separately Managed Accounts (Bonds),
Alternative Investments (Funds and Private)

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

All investments carry a certain risk and there is no assurance that an investment will provide positive performance over any period of time. Information obtained from third party resources are believed to be reliable but not guaranteed as to its accuracy or reliability. These materials do not purport to contain all the relevant information that investors may wish to consider in making investment decisions and is not intended to be a substitute for exercising independent judgment. Any statements regarding future events constitute only subjective views or beliefs, are not guarantees or projections of performance, should not be relied on, are subject to change due to a variety of factors, including fluctuating market conditions, and involve inherent risks and uncertainties, both general and specific, many of which cannot be predicted or quantified and are beyond our control. Future results could differ materially and no assurance is given that these statements or assumptions are now or will prove to be accurate or complete in any way.

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.

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