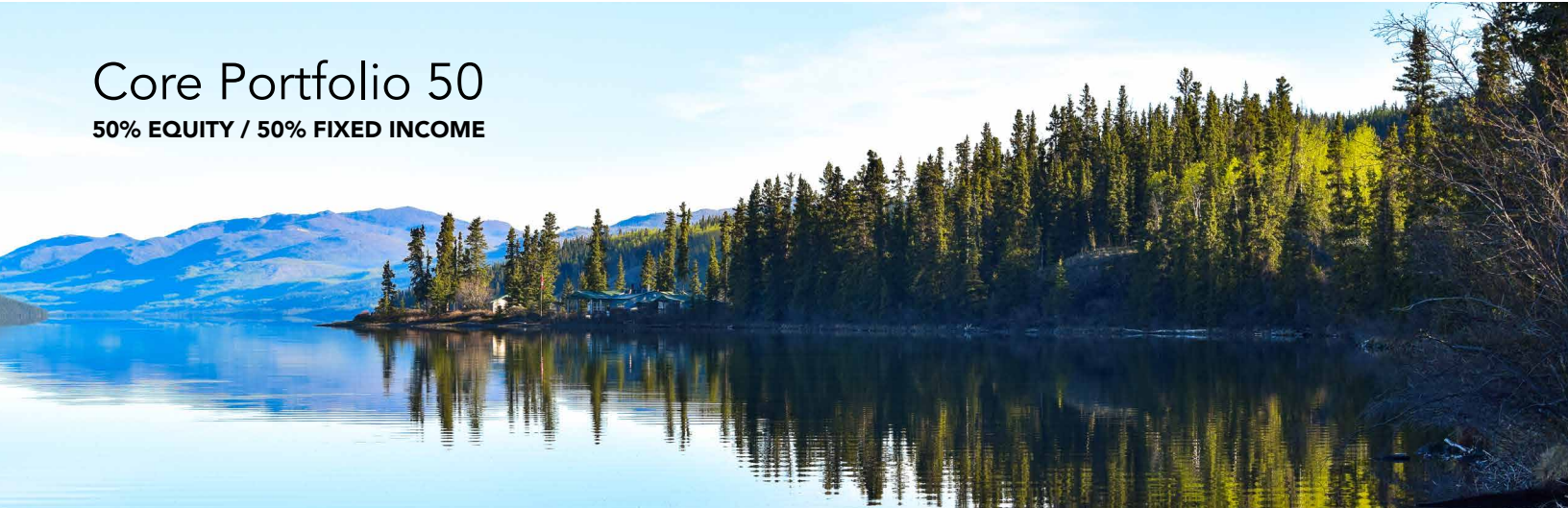# Dynamic™ Wealth Advisors

Core Portfolio 50
50% EQUITY / 50% FIXED INCOME

Investment Objective

Balanced Portfolio:

The Dynamic Core Portfolio 50 utilizes index-based ETFs for equities, bonds and REITs. With a target equity allocation of 50%, this portfolio seeks to minimize cost and diversify across asset classes and sub-asset classes. This model may be suitable for investors who are focused on longer-term total return.
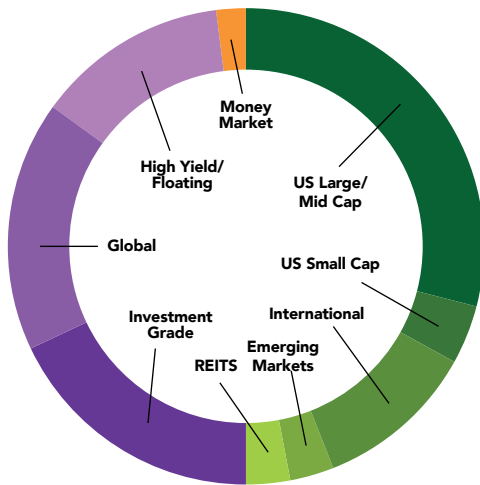
Asset Category	Asset Class	Allocation	Internal Cost
Equity	US Large Cap/Mid Cap	29%	0.07%
	US Small Cap	4%	0.15%
	International	11%	0.40%
	Emerging Markets	3%	0.14%
	REITS	3%	0.12%
Fixed Income	Investment Grade	18%	0.06%
	Global	17%	0.09%
	High Yield/Floating	13%	0.30%
Cash Equivalents	Money Market	2%	0.00%
Core Portfolio 50% Total		100%	0.14%

RTQ Score

RISK
49

riskalyze® Score

RISK
49

Dynamic Philosophy

Dynamic Portfolio Services uses a rules-based and process-driven methodology with the objective of delivering risk-adjusted returns, meeting or exceeding applicable benchmarks. Based on more than 50 years of academic research, Dynamic believes asset allocation is the primary driver of portfolio results. We strive to focus on delivering optimized risk-adjusted allocations that are cost and tax efficient. Our passion is to deliver extraordinary value to advisors through an array of portfolio options, consulting, tax management, trade execution, monitoring, rebalancing, ongoing support and practice efficiencies.

877.257.3840 | **joinus@dynamicwealthadvisors.com** | **dynamicwealthadvisors.com**

Disclosure: