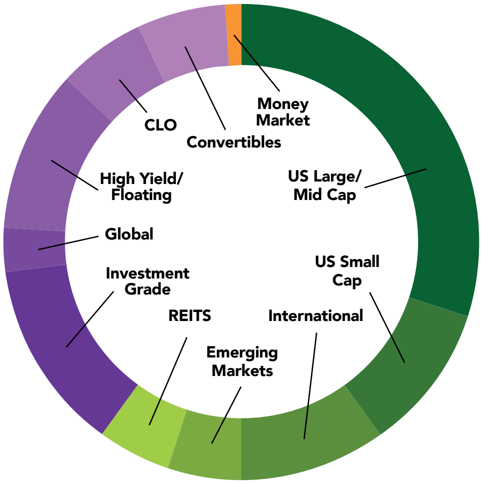
Tax Managed 60

60% EQUITY / 40% FIXED INCOME

Investment Objective

Multi-factor Equity + Multi-strategy Fixed Income:
The Dynamic Tax Managed 60 is a blend of our multi-factor equity strategy coupled with our multi-strategy core bond plus fixed income strategy. This tax managed model is appropriate for tax-sensitive clients in non-qualified accounts with longer time horizons and an ability to tolerate moderate levels of portfolio volatility.



Asset Category	Asset Class	Allocation	Internal Cost
Equity	US Large/Mid Cap	30%	0.23%
	US Small Cap	10%	0.47%
	International	10%	0.36%
	Emerging Markets	5%	0.52%
	REITS	5%	0.18%
Fixed Income	Investment Grade	13%	0.84%
	Global	3%	0.27%
	High Yield/Floating	11%	0.85%
	CLO	6%	1.59%
	Convertibles	6%	1.59%
Cash Equivalents	Money Market	1%	0.00%
Tax Managed 60% Total		100%	0.59%

RTQ Score

RISK 63

riskalyze Score

RISK 70

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.

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Disclosure:

Dynamic™
Wealth Advisors