

Dynamic Investment Management

Where client journeys begin.



As Life Stages Evolve, So Too Should Your Clients' Investments

As your clients move through life stages and their needs evolve, lowering risk isn't the only solution to improve the probability of reaching their long-term financial goals. Choosing the right strategy at each stage of your client's journey may also improve their investment outcomes.



At Dynamic, we align client behaviors with life stages, building **portfolios for planners** at every stage in the journey.

Getting Started

Your client, 25-35, is in their foundation years with a high tolerance for risk and few worries. You're helping them manage cash flow and plan for the future. At this stage, younger clients have a long-time horizon and can invest more of their earnings into higher risk, growth-focused portfolios.



Dynamic High Growth Strategy invests in more granular exposures, including sectors and industries, as well as other areas of the market where your Dynamic Portfolio Services team sees long-term growth potential.



Building Years

Your client, 35-50, is ramping up wealth accumulation though it's a delicate balancing act. You're advising them to set aside a portion of their earnings in tax-favored accumulation vehicles such as IRAs and 401(k) plans and if they have children, to consider a college savings program. During this stage, given a greater capacity to save and invest, a more balanced investment approach may be appropriate.



Dynamic Market Cycle Strategy invests in allocations that tactically rotate to favorable exposures based on current market cycles, providing a more balanced and actively managed investment approach.



Stability

Your client, early 50s-early 60s, has reached their preservation years. You're ensuring that their future financial security won't be compromised by unnecessary taxes and penalties. At this stage, investment strategy should be shifting to a more conservative approach, focusing on preservation of wealth as retirement nears.



Dynamic Defensive Strategy invests in exposures with more defensive attributes that can help protect portfolios on the downside during market corrections while participating in market upsidess.



Retirement

Your client, mid-60s and beyond, can begin to enjoy the fruits of their hard work and planning. You've advised them to plan carefully to enjoy their retirement years, but your work isn't done. You're helping them with estate planning, charitable giving strategies and how best to manage expenses. At this stage, clients may be taking distributions and are more focused on stable income generation within their portfolios.



Dynamic Distribution Strategy invests in allocations focused on income generation such as dividend stocks and higher yielding sectors.



Building financial freedom takes a lifetime. Are you maximizing the stages of your clients' lives with a risk-focused and diversified investment management strategy to help them reach their financial goals and achieve their dreams?



Schedule a demo today to learn how Dynamic Portfolio Services can help you along the journey of your clients' life stages.

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Dynamic Portfolio Services uses a risk-focused philosophy combined with a rules-based investment process to deliver enhanced, risk-adjusted returns. Our objective: To provide well diversified portfolios with robust due diligence, leading to better outcomes and improving the probability of reaching clients' long-term goals. Our passion: To deliver extraordinary value to advisers through an array of portfolio options, consulting, tax management, trade execution, monitoring, rebalancing, ongoing support and practice efficiencies. For more information, visit:

DynamicAdvisorSolutions.com/portfolio-services