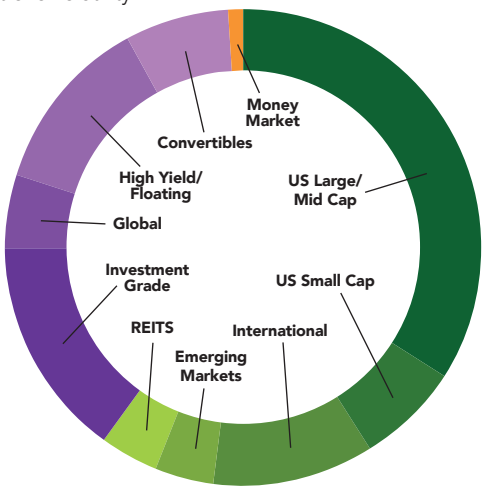
Dynamic Wealth Advisors

Mid-size 60

60% EQUITY / 40% FIXED INCOME

Investment Objective

Multi-factor Equity + Multi-strategy Fixed Income:
The Dynamic Mid-size 60 utilizes our multi-factor equity strategy coupled with our multi-strategy core bond plus fixed income strategy. This model is appropriate for portfolios of $250,000 up to $1 million with a focus on longer-term total return. This portfolio is appropriate for investors with longer time horizons with an ability to tolerate moderate levels of portfolio volatility.



Asset Category	Asset Class	Allocation	Internal Cost
Equity	US Large Cap/Mid Cap	34%	0.21%
	US Small Cap	7%	0.37%
	International	11%	0.30%
	Emerging Markets	4%	0.52%
	REITS	4%	0.18%
Fixed Income	Investment Grade	15%	0.90%
	Global	5%	0.27%
	High Yield/Floating	12%	0.64%
	Convertibles	7%	0.60%
Cash Equivalents	Money Market	1%	0.00%
Mid-size 60% Total		100%	0.59%

RTQ Score

RISK 61

riskalyze Score

RISK 68

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 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:

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The RTQ and Riskalyze Scores are tools issued by unaffiliated independent third-party providers and intended to assist advisors and clients in evaluating the appropriate investment strategy based on the client's risk tolerance and other considerations. The RTQ Score is derived from answers to firm's risk tolerance questionnaire and is used to determine investor alignment with projected model risk characteristics. The Riskalyze Score is derived using Riskalyze's proprietary application and is representative of the level of risk/volatility a portfolio would exhibit if invested in the model, with 100 being highest, for a limited time frame used by Riskalyze. Riskalyze scores fluctuate based upon the recent volatility of the model positions and the underlying assumptions and metric may change over time. Target risk exposures may differ among clients with similar profiles based on various factors, including each individual client's investment objectives, financial situation and risk tolerance. Information contained herein has been obtained from sources believed to be reliable, but is not guaranteed and no representations are made the risk scores or other metrics will be accurate or protect clients against market losses.

The model portfolios presented are designed to assist advisors and clients in evaluating investment strategies. Investing in stocks, bonds, and other assets present various forms of risk to investors and could result in losses. Exchange Traded Funds (ETFs) and mutual are sold by prospectus. Please consider the specific ETF or mutual fund's investment objectives, risk, charges and expenses carefully before investing. The prospectus, which contains this and other information, can be obtained by contacting your Advisor. Read the prospectus carefully before investing; positive returns are not guaranteed. There is no guarantee that the model portfolios or any investment strategies will work under all or any market conditions. They may not be appropriate for all investors and each investor should evaluate their ability to invest long-term, especially during periods of a downturn in the market. Past performance is not a guarantee of future returns.

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