

Dynamic Investment Management

Elevate your investor experience.



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.



We build portfolios for planners by aligning client behaviors with life stages along the journey.



Building Years

Your client, 25-50, 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 Smart Strategy invests in multi-factor (Smart Beta) equity exposures and actively-managed fixed income with higher conviction portfolio tilts and more granular asset class exposures.

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 upsides.



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 Income 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 Investment Management can help you along the journey of your clients' life stages.

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At Dynamic, 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. 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. For more information, visit:

DynamicAdvisorSolutions.com/im

Dynamic makes no implied or expressed recommendations regarding the manner in which clients' accounts should be invested. The appropriate strategy depends on the client's specific investment objectives and financial situation. This is not intended to be used as guide to investing, or source of any specific recommendation. It does not constitute an offer or solicitation with respect to the purchase or sale of any security in any jurisdiction in which such an offer or solicitation is not authorized or to any person to whom it would be unlawful to make such an offer or solicitation.

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