High-Net-Worth Solutions

Dynamic specializes in evaluating complex client situations and finding simple solutions for High-Net-Worth clients. In addition to building custom strategies which could include stocks, bonds, exchange-traded funds (ETFs) and alternative investments, we have a variety of unique products to meet specific client situations.

Best use scenario:
Alpha Generation

Private Equity
Access to private company investing

Stock SMA
Actively managed individual stock portfolios

Best use scenario:
Concentrated Stock Positions

Exchange Funds
Diversify concentrated stock positions with broad based indices for diversification and tax deferment benefits

Options
Custom options strategies with potential to limit downside and/or increase income generation

Best use scenario:
Corporate Retirement Solutions

Cash Balance Plan
Combination of a 401k plan & Defined Benefit Plan — fully fund a 401k plan and at least $30K in a DBP annually

Defined Benefit Plan
Pre-tax contribution funded by a company for highly compensated individuals

Dynamic Investment Management

Elevate your investor experience.

Best use scenario:
Defensive Positioning

Hedge Funds
Typically utilize long and short positions to generate alpha regardless of market environment

Structured Notes
Utilize derivatives to track an index return while providing potential downside protection

Best use scenario:
Enhanced Borrowing Power

Pledged Asset Lending
Provides utilization of non-purpose loans

Best use scenario:
Income Generation

Individual Bond Ladders
Target individual bond maturities to align with distribution cycles while providing stable income generation

Private Credit
Access to private credit markets

Private Real Estate
Access to private real estate

Best use scenario:
Tax Optimization

1031 Exchange
Sell a real estate property and swap it for a new one of similar purpose to defer capital gains tax on the sale

Direct Indexing
Daily tax loss harvesting using individual stocks tracking an index, with a multitude of customization options (including ESG screens and factor tilting)

Individual State Specific Muni
Maximize tax benefit with state specific actively managed individual bond separately managed accounts

Qualified Opportunity Zones
Invest in government designated economically distressed communities where investment may be eligible for preferential tax treatment

For more information, visit
DynamicAdvisorSolutions.com/InvestmentManagement or contact our team today at 877.257.3840, ext. 4 or investmentmanagement@dynamicadvisorsolutions.com

Disclosure:
All investments carry a certain risk and there is no assurance that an investment will provide positive performance over any period of time. Information obtained from third party resources are believed to be reliable but not guaranteed as to its accuracy or reliability. These materials do not purport to contain all the relevant information that investors may wish to consider in making investment decisions and is not intended to be a substitute for exercising independent judgment. Any statements regarding future events constitute only subjective views or beliefs, are not guarantees or projections of performance, should not be relied on, are subject to change due to a variety of factors, including fluctuating market conditions, and involve inherent risks and uncertainties, both general and specific, many of which cannot be predicted or quantified and are beyond our control. Future results could differ materially and no assurance is given that these statements or assumptions are now or will prove to be accurate or complete in any way.

Past performance is not a guarantee or a reliable indicator of future results. Investing in the markets is subject to certain risks including market, interest rate, issuer, credit and inflation risk; investments may be worth more or less than the original cost when redeemed.

Investment advisory services are offered through Dynamic Advisor Solutions, LLC, dba Dynamic Wealth Advisors, an SEC registered investment advisor.