Dynamic
Wealth Advisors

Dynamic Asset Management
Elevate your investor experience.

Why Dynamic Asset Management?

Dynamic Asset Management

Elevate your investor experience.

Why Dynamic Asset Management?

Your wealth advisor has partnered with Dynamic to deliver an exceptional investor experience. This begins with the depth and breadth of Dynamic's dedicated Asset Management team that puts risk management first, helping you achieve your long-term financial goals.

With more than 150 years combined experience in the investment industry, these experienced professionals possess the institutional knowledge and know how to strategically design and manage global, well diversified, balanced portfolios focused on the long-term. And that's not all.

An array of investment options, due diligence, portfolio consulting and analysis, and ongoing risk oversight... These are just a few of the ways your advisor derives value from Dynamic Asset Management and in turn, elevates their value to you, providing sound advice at any stage along your investment journey.

dynamicwealthadvisors.com | 877.257.3840 | /dynamicadvisorsolutions | /dwaadvisor

Dynamic Wealth Advisors

Dynamic Asset Management

Elevate your investor experience.

With Dynamic, Your Advisor's Value Has Never Been Stronger

Your advisor's affiliation with Dynamic is part of a growing network of approximately 83 wealth advisory practices across the U.S., managing more than $5.8 billion of assets (as of February 2025). Dynamic's extensive asset management experience and resources include relationships with industry-leading custodians Fidelity Institutional®, Charles Schwab and Raymond James, as well as investment managers, financial technology platforms and research providers.

Adding value means adding alpha. With Dynamic, your advisor has instant access to best practices in wealth management. Some of the ways Dynamic's Asset Management team increases an advisor's alpha include:

- **Asset allocation and portfolio construction**
- **Risk and error mitigation**
- **Behavioral finance coaching**
- **Asset class and manager diversification**
- **Tax management strategies**
- **Rebalancing and ongoing portfolio monitoring**
- **Custom, multi-strategy portfolios**

Derive Value from Your Advisor Relationship

Since its inception in 2009, Dynamic has been an industry leader in providing professional services and practice support to wealth advisors so they can focus on their clients. Dynamic places a premium on delivering solutions to enhance the advisor-client relationship.

Deepening the advisor-client relationship is imperative in the world of investing. At Dynamic, we believe a focus on the long-term, rather than trying to time the market, improves investors' chances of reaching their goals. Side by side with your advisor, you can be rest assured of the benefits their partnership with Dynamic passes along to you:

Expanded investment options. Through Dynamic, your advisor offers a variety of strategies, including proprietary model portfolios, separately managed accounts, personal indexing, alternative investments and unique high-net-worth solutions.

Institutional-level partnership. By partnering with Dynamic, your advisor has a well-established and experienced asset management team in their corner; the team takes pride in a risk management-focused philosophy and a consistent, time-tested investment process.

Lower overall costs. Your advisor has access to Dynamic's scale and ability to access unique products, services and pricing. For example, due to relationships with custodians, Dynamic can access discounted transaction charges and low-cost share classes.

Dedicated Asset Management team. With this specialized team, clients can experience improved trade execution, tax efficiency and lower turnover. In addition, Dynamic's Asset Management team is highly skilled at solving simple to complex client situations that call for high-touch, customized solutions beyond standard portfolios.

Dynamic Custom HNW solutions. High-net-worth (HNW) clients often require an added level of customization and personalized service based on their specific needs. In addition to building custom strategies which could include stocks, bonds, ETFs and alternative investments, Dynamic offers a broad range of unique products to meet specific client situations. We work closely with wealth advisors to produce custom-tailored proposals to help support their HNW clients.

The Dynamic experience. While asset management is an important aspect of financial planning, the primary objectives are to help clients navigate market uncertainty and achieve their financial goals. Ultimately, when advisors choose Dynamic Asset Management, it frees up their time exponentially, allowing for a focus on what advisors and their clients really care about, the personal relationship.

Talk to your wealth advisor to learn how Dynamic Asset Management can help you along your journey to financial freedom or visit DynamicWealthAdvisors.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.