

Freedom Foundation®



Traditional asset allocation with active risk management

The Freedom Foundation® Element of Freedom Capital Management Strategies® takes a traditional approach to portfolio management and applies the theory that the effective allocation between investment asset classes can achieve an optimal balance of risk and opportunity for each client. Unlike simple asset allocation, which prescribes a static mix of the three major asset classes (stocks, bonds, and cash), Freedom Foundation® incorporates an active management approach that responds to changes in the global capital markets. Similar to a traditional portfolio, this Element has allocation ranges for each asset class that provide a starting point for investment decisions; however, an active management strategy enhances this traditional approach by continually evaluating which asset classes to overweight and underweight in an effort to achieve improved risk-adjusted results.