

# FOCUSED MODEL

THIS MODEL IS ELIGIBLE FOR RISK ASSIST | THIS MODEL IS ELIGIBLE FOR PRINCIPAL GUARD



## ABOUT THE FREEDOM DYNAMIC® ELEMENT

*Tactical asset allocation with concentrated positions for potentially higher returns*

The Freedom Dynamic® Element of Freedom Capital Management Strategies® utilizes tactical asset management and concentrated portfolios in an effort to achieve higher rates of return with less attention to levels of risk. This Element incorporates economic, quantitative, and fundamental analysis of capital markets to identify the most compelling investment opportunities globally and allows portfolio managers the flexibility to make concentrated investments across asset classes, geographies, economic sectors, and investment styles.

## INVESTMENT OBJECTIVE

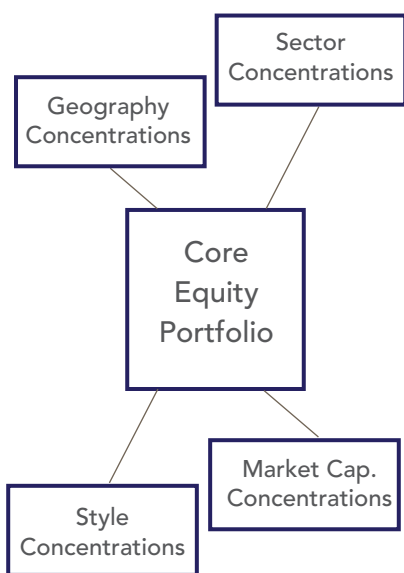
Investors choosing the Dynamic Focused Model seek maximum growth and appreciation of their assets through a tactically managed, flexible investment process that attempts to outperform equity markets over the long run.

## ABOUT DYNAMIC FOCUSED

The Dynamic Focused Model is a core equity strategy that seeks to add value by making concentrated, tactical satellite investments in different geographies, economic sectors, market capitalizations, and investment styles. The portfolio is dynamically and flexibly managed by the portfolio management team who utilize economic, quantitative, and fundamental analysis to identify the most compelling investment opportunities across global equity markets.

## REASONS TO CONSIDER THIS PORTFOLIO

- You seek maximum growth and appreciation of your investable assets with no concern for current income.
- You can tolerate levels of risk similar to or greater than global equity markets.
- You desire a portfolio that provides maximum flexibility in an effort to achieve higher rates of return.
- You are not tied to a static allocation strategy and seek to capture shorter run deviations in global capital markets through tactical investment decisions.
- You prefer a strategy that invests in actively managed mutual funds.
- This model is eligible for Risk Assist or Principal Guard.



## FACTS:

Manager	Team Managed
Portfolio Holdings	Mutual Funds
Model Minimum	\$500
Model Minimum with Risk Assist	\$10,000
Model Minimum with Principal Guard	\$50,000