

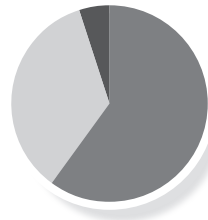
# Trademark Portfolio Solutions

## WELCOME TO TRADEMARK

We all have busy lives, and it can be challenging to find time to balance all of life's responsibilities, including investing. Trademark Capital is a boutique investment management team that seeks to bridge the gap between impersonal investments and a sound personal financial plan. We are an experienced team of investment professionals committed to a solid plan of portfolio management based upon active adjustments, as appropriate, in response to what we know to be true: markets change. We set our sights on the individual investment goals, priorities, and limits of each client to develop a roadmap designed to reach the intended financial destination.

## THE PROBLEM: INDUSTRY PASSIVE BUY & HOLD APPROACH

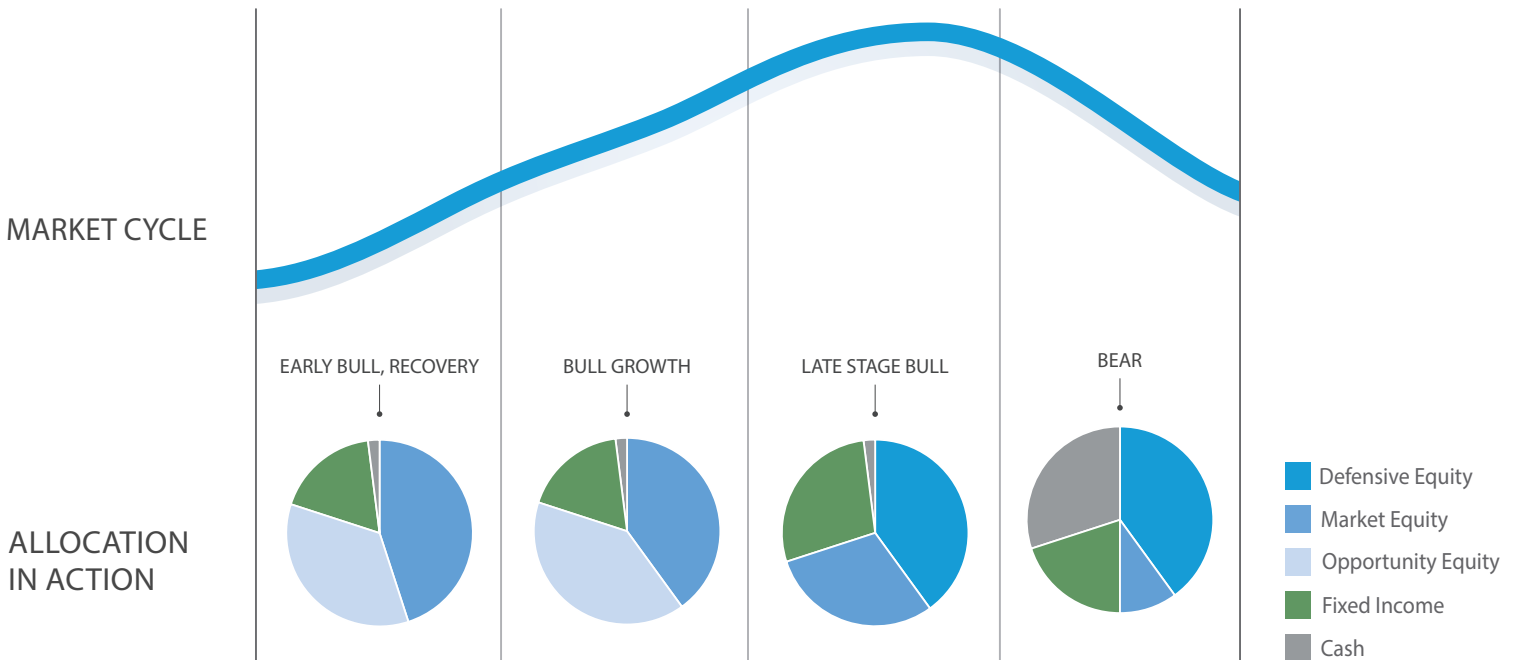
Standard portfolios are passive, no matter the market environment. Quite simply, the holdings within a standard portfolio will remain the same, whether in a high-return/low-risk market or vice versa. Just as habits and attire evolve with the seasons, we believe portfolios should change with the market seasons. Passive portfolios can contribute to emotional turmoil during dark and stormy markets. And this turmoil can, in turn, lead to bad investment decisions.



This is what you can normally expect from a Passive Buy and Hold portfolio for all market cycles.

- Equity Diversified
- Fixed Income
- Cash

## A BETTER WAY.



## WHAT WE DO

Trademark Total Portfolio Solutions are designed to make material shifts in portfolios by matching unique investment goals with the changing market environment. These shifts apply to high-return/low-risk markets, low-return/high-risk markets, and everywhere in between. We actively manage clients' portfolios and do not sit statically and advise clients to stay the course regardless of what the market is doing. We watch the market and make tactical shifts as necessary based on our model. We believe successful investors do not avoid risk; they manage it.

## DISCIPLINED APPROACH

Our investment posture is based on our proprietary data-driven model, which analyzes multiple indicators on an ongoing basis to measure risk in the market. Our model gives us specific signs that drive our decision as to whether or not it is prudent to stay invested or modify our exposure. We believe being disciplined to our model will bring long-term success, and that is our focus. We are not “perma-bears,” quite the opposite. We want to be in the market, but only when our model indicates it is prudent to do so. We want all clients to understand that we are here to make money, not just to protect money.

## INVESTOR PROFILES

WHICH BEST DESCRIBES YOUR CLIENT?

ALLOCATIONS ■ Bonds ■ Equity ■ Cash

BULL MARKET

BEAR MARKET



### RISK AVOIDER

Focused on safety of capital.  
Low volatility and capital preservation are most important.



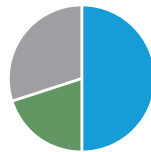
### RISK MITIGATOR

Accepts a minimal amount of risk in exchange for potential returns over the medium to long term.



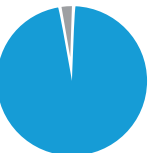
### RISK MANAGER

Seeks modest long-term capital appreciation.  
Preserving capital is a secondary goal.



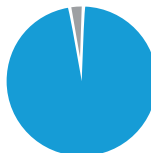
### RISK TAKER

Accepts more risk in an effort to increase potential returns over the medium to long term.



### RISK EMBRACER

Seeks to maximize potential returns over the long term by being more efficient through a full market cycle.



## SHELTER FROM THE STORM

Trademark Total Portfolio Solutions afford the ability to materially change the investor-advisor conversation. From the minute investors ask, “What will you do to protect my investments,” you can inform them of what has already been done. The Trademark Total Portfolio Solutions process is dedicated to providing both investors and advisors alike with confidence that their best interests are always at the forefront. We think the importance of this cannot be understated, especially during periods of turmoil.

## FOCUSED ON YOUR CLIENTS

When clients invest in Trademark Total Portfolio Solutions, they invest in a process that is designed to ensure their portfolios are carefully monitored and managed with discipline during every market cycle. We are committed to helping clients reach their individual life circumstances and investment objectives.

## DISCLOSURES

Trademark Capital Management, Inc. ("Trademark") is an investment adviser registered with the U. S. Securities and Exchange Commission under the Investment Advisers Act of 1940. Registration as an investment adviser does not imply any level of skill or training. Trademark Capital® is a registered service mark of Trademark Capital Management Incorporated, Watkinsville, Georgia. All other trade names, trademarks, and/or service marks are the property of their respective holders. As with all investments, Trademark's investment strategies are subject to risk and may lose money. Investment return and principal value of an investment will fluctuate so that an investor's portfolio may be worth more or less than their original investment. Stock prices fluctuate, sometimes rapidly and dramatically, due to factors affecting individual companies, particular industries or sectors, or general market conditions. Fixed-income securities involve interest rate, credit, inflation, and reinvestment risks. As interest rates rise, the value of fixed-income securities fall. The investment strategy presented is not appropriate for every investor, and individual clients should review with their financial advisors the terms and conditions and risk involved with specific products or services. Due to our active risk management, our managed portfolios may underperform during bull markets. No formula, model or other device is guaranteed to determine which securities to buy or sell, or when to buy or sell them. Trademark makes no representation that any formula or other device discussed will be effective.

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**CONTACT US TODAY**

Call: 706-534-2351

or visit [www.trademarkcapital.com](http://www.trademarkcapital.com)