

Trademark Tactical MultiFactor

What is Tactical MultiFactor?

The strategy may use a combination of different equity factors, indexes, fixed income, commodities, or alternatives to be opportunistic in identifying and capturing trends. As market trends shift, Tactical MultiFactor aims to shift with them. As stocks lose favor, our models are designed to be opportunistic in finding trends in many other asset classes. Cash and/or ultra-short duration fixed income may be utilized to become defensive as markets decline.

Efficient Reduction of Risk

We think it is crucial to manage risk. We establish predetermined exit criteria for each position as part of our risk management process. Although execution prices may differ from the target exit level, by aiming to limit downside exposure, we have the potential to maintain profitable positions when favorable market trends persist. The strategy applies its method of measuring trends to a combination of different equity factors, indexes, fixed income, commodities, and alternatives to be opportunistic in identifying and capturing trends.

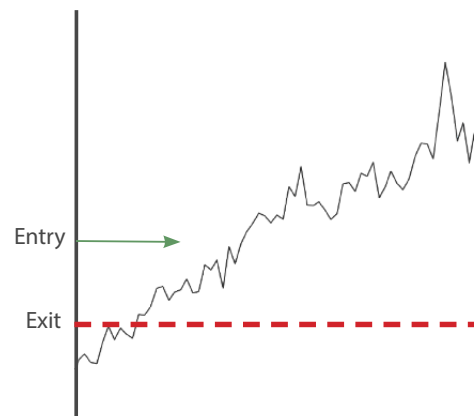


Illustration only. Exit criteria are part of the investment process but do not guarantee that losses will be limited. Market conditions, liquidity, and price gaps may result in losses greater than anticipated.

	Bull Market	Bear Market
Offense	• Momentum • Low Volatility • Indexes • Sectors	• Alternatives • Commodities • Currencies
Defense	• Alternatives • Commodities • Currencies • Bonds • Cash	• Cash (short-term bonds) • Bonds • Short

Offense & Defense

When stocks are going up, most people can make money. That is why buy-and-hold investors have been rewarded so well since 2010 as stock prices rose. What happens if stock prices don't rise?

Tactical MultiFactor thinks like a ball coach: offense and defense. When the stock market trend is up, we want to participate in that trend while always being mindful of our need to be defensive. Risk management is the key driver of everything that we do, and that is what we believe separates us.

Focused on You

When you invest in Trademark MultiFactor, you invest in a process that is designed to provide disciplined portfolio monitoring throughout every market cycle. We are committed to helping clients reach their individual investment objectives. So get back to enjoying your life; play golf, take a vacation, spend time with your family, we've got this.

Important Disclosure

Tactical MultiFactor is an actively managed investment strategy that seeks to identify investment opportunities using quantitative models and trend-following techniques. There is no guarantee that the strategy will achieve its investment objectives or successfully identify market trends. All investing involves risk, including the possible loss of principal. Risk management techniques, including predetermined exit criteria and defensive allocations, may reduce—but cannot eliminate—the risk of loss and may not perform as intended under all market conditions. Past performance is not indicative of future results.