

Tactical Preservation Strategy

VOLATILITY LEVEL: BELOW AVERAGE

Top 5 Stock Holdings

Holding Name

2 YEAR US TREASURY
NOTE

ISHARES IBOXX HIGH
YIELD BOND ETF

ISHARES NATIONAL
MUNI BOND ETF

ISHARES 20 PLS YEAR
TREASURY BND ETF

VANGUARD VALUE ETF

The holdings above are as of January 3, 2023 and are subject to change. A current list of all securities held by LPAM strategies is available upon request.

A tactical strategy for conservative investors that want to preserve capital first and do not require significant returns to meet their retirement goals.

The Preservation Strategy offers investors a conservative investment vehicle designed to minimize the risk that volatility and sequence of return risk can pose with short-term spending requirements.

Details and potential benefits of this strategy:

- Higher real yield interest rate environments
- Strong corporate earnings / cash flow

Measures of volatility and time horizon:

Beta is a measure of the systematic risk of a security or portfolio compared to the market as a whole. Standard Deviation is the rate of return on an investment portfolio and is used to measure the inherent volatility of an investment. An investment time horizon is the time period where one expects to hold an investment for a specific goal.

- 3-Year Portfolio Beta: .43 as of 12/31/2022
- 3-Year Standard Deviation: 8.69 as of 12/31/2022
- Time Horizon: 1-4 Years

Seek a priority to preserve capital.

The Preservation Strategy is an absolute return investment discipline that combines asset allocation with sector, bond and stock selection to target returns above the Bloomberg Barclays US Aggregate TR Index throughout all points of the business cycle.

Preservation Strategy Breakdown as of January 3, 2023

- Government Bonds: 62.85%
- Muni Bonds: 17.78%
- High Yield Bonds: 8.73%
- Vanguard ETF: 8.55%

Because the Opportunity Strategy is periodically adjusted to stay in line with your investment objectives, holdings are subject to change.

Structured to give you complete control.

LifePro Asset Management structures each strategy to be completely accessible and transparent. You'll be able to track your investments in real-time and move the account elsewhere if you see fit. Transparent fees include Product: 1.00% and Advisory: 1.00%.

Ready to take the next step?

Schedule a goal planning session with LifePro Asset Management today!
Call **1-888-LIFEPRO** or email **info@lifeproassetmanagement.com**

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