LifePro
Asset Management

Tactical
Preservation Portfolio

VOLATILITY LEVEL: BELOW AVERAGE

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 Portfolio 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.

Top 5 Stock Holdings

Holding Name
ISHARES TRUST FLTG RATE NT ETF
ISHARES TRUST IBOXX HI YD ETF
ISHARES TRUST IBOXX INV CP ETF
ISHARES TRUST 1 3 YR TREAS BD ETF
ISHARES 20+ YEAR TREASURY BOND ETF

The holdings above are subject to change. A current list of all securities held by LPAM strategies is available upon request.

Details and potential benefits of this portfolio:

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

Measures of volatility and time horizon:

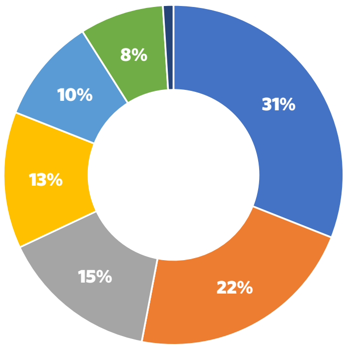
Beta is a measure of the systematic risk of a security or portfolio compared to the market as a whole. Standard Deviation is the rate of return on an investment portfolio and is used to measure the inherent volatility of an investment. An investment time horizon is the time period where one expects to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

- 3-Year Portfolio Beta: .43
- 3-Year Standard Deviation: 8.69
- Time Horizon: 1-4 Years

Please see reverse side for configuration of the Preservation Portfolio ►

Seek a priority to preserve capital.

The Preservation Portfolio 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.



Configuration of Preservation Portfolio

- Treasury Bonds: 31%
- Growth Equity: 22%
- High Yield Bonds: 15%
- Corporate Debt Equivalents: 13%
- Value/Dividend Equity: 10%
- Floating Rate Bonds: 8%
- Money Market: 1%

Because the Preservation Portfolio is periodically adjusted to stay in line with your investment objectives, we use ranges to illustrate target allocations.

Structured to give you complete control.

LifePro Asset Management structures each portfolio 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**

LifePro™ Asset Management

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