A Review of Our Portfolios

1 Stability → 2 Balanced → 3 Income Enhanced → 4 Growth Focus

Lower Equity Risk → Higher Equity Risk

Diversified Income

Fixed Income / Equity

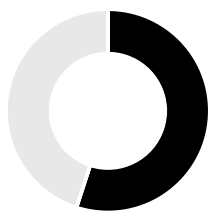
65/35

Strategic mix of fixed income and equities focused on stable tax efficient income.

Balanced Growth

Fixed Income / Equity

45/55

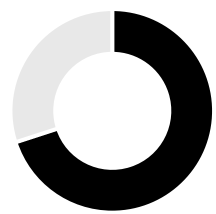


Stability from fixed income revenue and a 55% - 60% weighting to Aggressive Growth.

High Income

Fixed Income / Equity

30/70

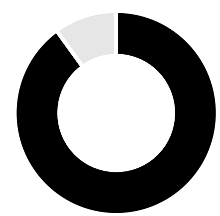


For those seeking higher levels of tax efficient income.

Aggressive Growth

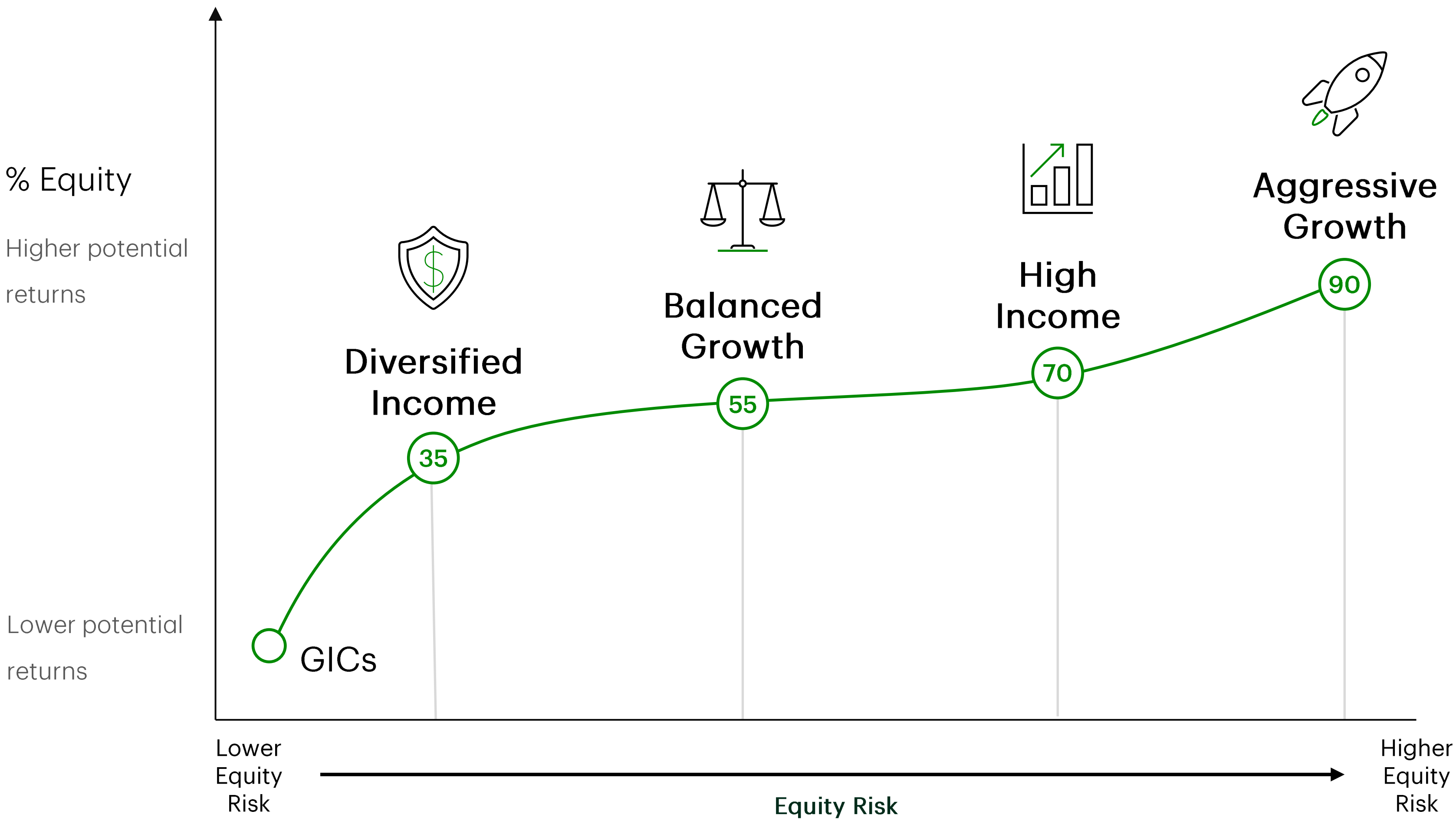
Growth Focused

~90% Equity



Strong performer with exposure to new economy businesses

Summary of Investment Strategies



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