Churchill Management Group

Investing for your Future

Investment Management

Be Strategic

MULTI-STRATEGY APPROACH

A multi-strategy approach assists clients in aiming to reduce volatility and risk while providing an underlying base of consistent returns to their portfolio.

Sample allocations based on risk tolerance:
● Fully invested ● Tactical

Moderately Aggressive

60% Fully Invested
40% Tactical

Moderate

35% Fully Invested
65% Tactical

Moderately Conservative

10% Fully Invested
90% Tactical

Tactical Strategies &

Percentage invested in the stock market varies substantially depending upon market risks..

Fully Invested Strategies

An active management approach that seeks to invest in the market leadership.

PREMIER WEALTH TACTICAL CORE

- No mandate to stay fully invested in equities and aims to reduce exposure in high risk markets.
- Unique investment top-down principles complemented with a bottom-up approach.
- Comprises both technical and fundamental research.

TACTICAL OPPORTUNITY

- Uses a quantitative model to find individual equities within the S&P 500 and the broader universe with upside growth potential.
- Aims to minimize downside risk by employing a stop-loss parameter.
- At times cash and cash equivalents may be utilized for a portion of the account during extended high risk markets.

ETF SECTOR ROTATION

- Aims to achieve superior returns by investing in outperforming sectors of the S&P 500 through ETFs.
- Based on a Client's chosen allocation, may also invest a portion of the account in various stylistic ETFs (i.e. large cap, growth) and International ETFs.

EQUITY GROWTH AND VALUE

- Individual stock portfolio aiming to own the top stocks in various sectors of the S&P 500.
- Aims to hold positive performers for long-term capital gains.

EQUITY DIVIDEND INCOME

- Seeks high quality, dividend paying stocks with yields typically higher than the S&P 500.
- Combines income with growth potential.

EQUITY GROWTH OPPORTUNITY

- Aims to generate excess returns over the long-term by investing in both growth and value equities.
- May invest in the entire universe of domestically traded equities.

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The risk profiles defined above are based upon the risk levels of various Churchill Management investment strategies. Individual clients may not fit exactly in any of these defined risk profiles. Clients should consider carefully their complete financial picture and personal and financial goals. Please review Churchill Management's complete ADV2 to understand certain risks involved with each individual investment strategy.