



Churchill Management Group

Investment Strategies

Forbes

Randy Conner, President, Named #15 Top Advisor 2018*

BARRON'S

Churchill ranked a 2018 Top 40 Independent Investment Advisor*



Top Financial Advisers 2019

Financial Times 300 Top Registered Investment Advisers for 2019*

FIRM BACKGROUND

- Registered Investment Advisor founded in 1963
- GIPS compliant firm with \$6.0 Billion in AUM as of 6/30/19*
- Individually managed accounts toward client's goals and objectives
- Management team with over 150 years of combined professional industry experience
- Frequent client contact (service team, monthly emails from Management, newsletters, webinars, face-to-face meetings, etc.)



CHURCHILL TACTICAL EQUITY STRATEGIES



PREMIER WEALTH TACTICAL AND PREMIER WEALTH TACTICAL CORE

- No mandate to stay fully invested in equities aiming 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

- Aims to combine individual stocks found from within the S&P 500 with stocks from the entire universe of domestically traded equities which have positive technical characteristics suggesting short-term opportunities.
- Aims to utilize cash and cash equivalents to protect capital during high risk environments.
- Quant-based model utilizing a stop loss parameter to set percent invested.

CHURCHILL FULLY INVESTED EQUITY STRATEGIES



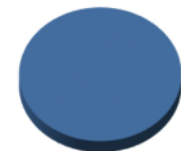
ETF SECTOR ROTATION

- Typically remains fully invested through all market cycles.
- Holds S&P 500 sector ETFs.
- Looks to overweight and underweight sectors based on proprietary model's signals.



EQUITY GROWTH AND VALUE

- Typically remains fully invested through all market cycles.
- Index alternative-individual stock portfolio aiming to own the top stocks in various sectors of the S&P 500.
- May use relative stop-loss triggers. Aims to hold positive performers for long-term capital gains.



EQUITY DIVIDEND INCOME

- Typically remains fully invested through all market cycles.
- Seeks high quality, dividend paying stocks with yields typically higher than the S&P 500.
- Combines income with growth potential.

CHURCHILL COMBINATION STRATEGIES



PREMIER WEALTH TACTICAL CORE /ETF SECTOR ROTATION

- Combines Premier Wealth Tactical Core with ETF Sector Rotation in one account.
- The combination allows a floor of percentage invested in equities.
- Varying balances available.

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*See Disclosure Provided Herewith. AUM includes both discretionary and non-discretionary assets under advisement. Churchill Management Group is a registered investment advisor. For GIPS® purposes the firm definition does not include direct real estate assets. Churchill Management Group claims compliance with the Global Investment Performance Standards (GIPS®). A compliant presentation and/or a list of the firm's composite descriptions are available upon request. Please contact us at info@churchillmanagement.com. GIPS® is a registered trademark of CFA Institute. CFA Institute has not been involved in the preparation or review of this report/advertisement. As with all investment strategies there is risk of loss. Please see Churchill Management's Form ADV2 to understand certain risks involved with each individual investment strategy.

BARRON'S RANKING

The Barron's ranking is for Churchill Management Group ("CMG"). The rating may not be representative of any one client's experience because the rating reflects a quantitative and qualitative analysis of factors that may include only a sample of the experience of CMG's clients. The rating is not indicative of future performance. CMG did not pay a fee to participate in the Rankings, but did purchase reprints of the Barron's article.

According to Barron's: The formula Barron's uses to rank advisors is proprietary. The rankings are based on data provided by individual advisors and their firms. Advisor data is confirmed via regulatory databases, cross-checks with securities firms and conversations with individual advisors. The formula Barron's uses to rank advisors is proprietary. It has three major components: assets managed, revenue produced and quality of practice. Investment returns are not a component of the rankings because an advisor's returns are dictated largely by the risk tolerance of clients. The quality-of-practice component includes an evaluation of each advisor's regulatory record.

FINANCIAL TIMES 300 TOP REGISTERED INVESTMENT ADVISERS

2019 Financial Times 300 Top Registered Investment Advisers ranking is for Churchill Management Group ("CMG"). The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the *Financial Times* (June 2019). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to The *Financial Times* in exchange for inclusion in the FT 300.

FORBES TOP 250 WEALTH ADVISORS FOR 2018

The Forbes ranking is for Randy Connor of Churchill Management Group ("CMG"). The rating may not be representative of any one client's experience because the rating reflects a quantitative and qualitative analysis of factors that may include only a sample of the experience of CMG's Clients. The ranking is not indicative of future performance. CMG did not pay a fee to participate in the Rankings but did purchase reprints of the Forbes listing. The ranking, which was developed by Forbes' partner Shook Research, is based on in-person and telephone due-diligence meetings and a ranking algorithm for advisors who have a minimum of seven years of experience. The ranking algorithm is based on quality of practice learned through telephone and in-person interviews, client retention, industry experience, review of compliance records, firm nominations, and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC which does not receive compensation from the advisors or their firms in exchange for placement on a ranking.