

Develop a Customized Portfolio GPS

Set Your Destination



- ▶ Determine portfolio objectives and risk guidelines

Enter the Financial Coordinates



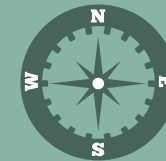
- ▶ Analyze current investment portfolio
- ▶ Develop strategic and tactical asset allocation strategy
- ▶ Construct investment portfolio

Chart Your Course



- ▶ Assess macro- and micro-economic trends and outlook for global capital markets
- ▶ Conduct rigorous due diligence, using institutional quality analytics

Navigate to Your Destination



- ▶ Evaluate progress of portfolio and recommend adjustments in accordance with GPS
- ▶ Real-time monitoring of "Green Zone" progress