



INVEST NOW

Access Code: **C16R**

SP Dynamic Advisor offers sophisticated investment management and advice for emerging investors.

SP Dynamic Advisor is a client-focused online platform that provides you with Convenience, Accessibility, On-Demand Service, and Professional Management.

KEY BENEFITS

Professional Investment Management

Steel Peak Wealth Management is the Registered Investment Advisory firm that



Easy Setup

It only takes a few minutes via website or mobile app to complete an investor risk profile that is mapped to a portfolio based on the assessment of your profile. We

manages the diversified portfolio construction by choosing from over 450 ETFs across all major fund families. SP Dynamic Advisor uses smarter technology to achieve a better solution. We turn complexity into clarity.

review the results, and upon approval the money is invested. This is a paperless account opening and funding experience.

Link your bank account for easy funding. Consolidate retirement accounts with 401(k) direct rollovers or account transfers.

OUR PAPERLESS PROCESS

REMEMBER
TO KEY IN YOUR
ACCESS CODE
C16R
WHEN INITIATING
YOUR ACCOUNT

STEP

1

Click **Invest Now**, which will direct you to Institutional Intelligence Portfolios through Charles Schwab.

You may download the **Mobile App**: *Institutional Intelligent Portfolios*.

Click "**Get Started**" and Enter Advisor Program Key: C16R

STEP

2

Complete enrollment and funding for your new account. Within 24 hours you will receive two notifications from SP Dynamic Advisor:

- Welcome to SP Dynamic Advisor Email
- Steel Peak Wealth Management Email via DocuSign - Complete the account set up with your eSignature.

STEP

3

Once you have eSigned the documents, your account will be accepted. Account information and statements can be accessed via website or mobile app.

Low Cost

Our clients pay just 0.5% or less per year for investment management (assessed quarterly). Your fee includes all trading, automated rebalancing for accounts over \$5,000, dividend reinvestment, and with an account value of \$50,000 or more you'll have the option to enroll in tax loss harvesting. No trading commissions are charged to you.

On Demand Access

Ongoing account management is easy and paperless, too. Login via website or mobile app for automatic access to statements and performance reports.

Account Minimum

\$5,000

The more you invest, the less fees you pay.

Account Balance

\$0 - \$100,000

\$100,001 - \$1,000,000

\$1,000,001+

Annual Fee

Invest Now

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21650 Oxnard Street, Suite 2300, Woodland Hills, CA 91367, F 818.835.8730

spdynamicadvisor@spwm.com

