



# GROW YOUR BUSI

Recent Appearances and Contributions



## Smart Diversification



## WHY

Because investors want to comfortably reach their goals, participate in up markets and limit downs...

Because diversification alone cannot protect investors from Bear Markets...

We developed a disciplined, systematic investment approach using algorithms to engineer portfolios that are math-based, empirically constructed and with a process that is repeatable.

We make portfolios smarter by using a risk-management overlay – like breaker switches on each part of the portfolio – in order to make incremental moves. It helps make the ride smoother than diversification alone.

Choose the Smart Diversification<sup>®</sup> approach that works best for your practice:

## **FROM OUR FOUNDER**

When clients succeed, financial advisors succeed. We're built by advisors – for advisors, and we make portfolios smarter by making diversification smarter. If you are an advisor focused on your clients' success, we want to play a part in your success story.”

– Greg Luken

**CHOOSE THE SMART  
DIVERSIFICATION<sup>®</sup> APPROACH THAT  
WORKS BEST FOR YOU.**

Do you want:

Tools to build your own portfolios?

**GET RESEARCH**

Time-saving model portfolios you  
implement?

**GET MODEL DELIVERY**

Turn-key, outsourced investment  
management?

# GET SEPARATE ACCOUNT MANAGEMENT

## MAIN OFFICE

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Franklin, TN 37067

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(615) 550-5570

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