CAMELOT PORTFOLIOS IS A COMPREHENSIVE INVESTMENT MANAGEMENT COMPANY

We provide the tools necessary to build tailored portfolios

SCHEDULE A CALL (/CALENDLY)

CAMELOT
PORTFOLIOS

Since our founding in 2008, Camelot Portfolios has delivered investment solutions that make it easy for Advisors to make their client's calling a reality. From basic capital preservation to complex alternative strategies; we help advisors differentiate and deliver value. Contact our team today to learn about how Camelot can help deliver more value and better outcomes for your clients.

TURNKEY PORTFOLIO SOLUTIONS

Fully Diversified Portfolios Designed For Specific Outcomes

Each of our three turnkey portfolios is designed to deliver the specific growth or income attributes necessary for your client's target outcomes. Each series offers four different risk profiles to match your clients preferences.

ORCHARD PORTFOLIOS

"TAKE THE FRUIT, NOT THE TREE"

FOURTRESS PORTFOLIOS

"GROW YOUR RETIREMENT NEST EGG"

LEGENDS PORTFOLIOS

"INVEST LIKE THE LEGENDS"

DOWNLOAD WHITE PAPER

Orchard Portfolios are designed to deliver retirement income using an active fundamental investment approach.

DOWNLOAD WHITE PAPER

Fourtress Portfolios are designed to deliver long-term total return using a quantitative approach with exposure to four time-tested investment components; global diversification, factor-based fundamental, tactical, and alternatives.

REQUEST INFORMATION (/CONTACT-CAMELOT)

Legend Portfolios are designed to deliver long-term total return using a active fundamental investment approach.

BUILD YOUR OWN PORTFOLIOS

Build Your Own Portfolios Using Our Strategies

We offer core strategies that are fully diversified, as well as specialty strategies that can be used to round out a portfolio with unique needs. Risk associated with each strategy can range from a beta (S&P 500) of <.25 to 1+ and strategies are mixed to balance client risk tolerance and time horizon with desired outcomes.

SEE LIST OF INDIVIDUAL STRATEGIES (/BUILDYOUROWN)

CUSTOM PORTFOLIOS

Custom Portfolios Designed Specifically for High-Net Worth Clients

Legacy positions, highly concentrated portfolios, unique income needs, etc. can all be situations where a ***custom*** approach to investing may be required. We routinely use alternatives, bonds, & the derivative market to both reduce risk & increase cash flow.

- *Custom Built Portfolios & Option Writing*
- *Advanced Investment Strategies For High Net Worth*

- *Qualified Replacement Properties (QRP)*
- *Private Equity*
- *Highly Concentrated Position Exit Strategies*
- *Advanced Charitable Planning*

Using strategies such as individually selected laddered bonds and option based portfolios we strive to serve the needs of more complex portfolios often presented by high net worth clients.

JOIN OUR MARKET UPDATE CALL (/MARKETCALL)

EXPLORE ALL OF THE WAYS YOU CAN ACCESS CAMELOT STRATEGIES

We have a suite of turnkey investment solutions whether you want to access Camelot directly, through a TAMP, or at your favorite custodian.

Choose an option that works with your model.

DIRECT

Working with Camelot directly will provide you access to Camelot's suite of turnkey portfolios, separately managed strategies, and a dedicated relationship manager.

Additionally, Camelot's direct relationships provide advisors access to our specialized consulting services focused on business development, charitable planning, estate planning, and marketing deliverables.

PLATFORM

Working with Camelot via platform will provide you access to the turnkey portfolios and separately managed strategies available on your platform. Additionally, we serve platform advisors with access to a dedicated relationship manager.

If you would like to find a Camelot strategy on your platform of choice, we are happy to help you locate your preferred solution.

FUNDS

Much like our individual strategies, Camelot's Mutual Funds can be added to your portfolios based on desired outcomes. We have three mutual funds:

Premium Return Fund (CPRIX) & Excalibur Small Cap Fund (CEXIX) - Both funds utilize options to deliver cash flow. Visit CamelotFunds.com (http://www.camelotfunds.com) for more information.

Event-Driven Fund (EVDIX) - This fund invests in companies experiencing major changes that will unlock shareholder value.

CamelotEventDrivenFund.com (http://www.CamelotEventDrivenFund.com) for more information

REQUEST ACCESS TO CAMELOT (/CONTACT-CAMELOT)

SCHEDULE A CALL TODAY

Steve Prew at Camelot Portfolios

15 Minute Call

15 min
I will call you!
Choose a date. Choose a time. I will call you, Thank you!

Select a Date & Time

Select a Day

July 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

REQUEST MORE INFORMATION

Name *

First Name

Last Name

Email Address *

Frim Name

Phone *

(###) ### ####

What is your preferred method to access Camelot strategies? *

Check all that apply:

- TAMP/Platform
- Direct
- Funds
- Not sure at this time

Which solution(s) would you like to learn more about?

Check all that apply:

- Income Strategies
- Growth Strategies
- Specialty Strategies
- Fourtress Turnkey Portfolios
- Orchard Turnkey Portfolios
- Legends Turnkey Portfolios

SUBMIT

CAMELOT PORTFOLIOS

Call Toll Free: 855-CPR-FUND

Corporate Headquarters
Camelot Portfolios, LLC
1700 Woodlands Drive,
Suite 100
Maumee, OH 43537