



INTRO VIDEO



# Optimizing Fixed Income Solutions

Are your bonds vulnerable to rising interest rates?



## BOND ALTERNATIVE

Bonds (typically a safe haven investment and a source of income) can suffer the loss of principal when interest rates rise.



## REDUCE EQUITY RISK

While stocks have provided strong returns, it may be time to rebalance.



## BOND O

Adding premium securities to a bond portfolio can provide a return

**Theta Income:** A 3 Dimensional Approach to Income Investing

**Watch a brief video to learn more about our strategy.**