

We're TRADEMARK. Like-minded individuals, united under a common vision: **Adamant protection of investments during inevitable periods of risk.**



- [Managed Accounts](#)
- [Retirement](#)
- [Publications](#)
- [About Us](#)
- [Contact Us](#)

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{ Choose a path to discover the TRADEMARK difference }

## Trademark

### Managed Accounts

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### Managed Accounts

Tactically balancing safety and return for two decades.

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## Trademark

### Retirement

## Trademark

### Retirement

When it comes to retirement, failure is not an option.

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## Trademark

### Managed Accounts



[Tactical Risk Strategy Factsheet](#)



[Tactical Risk Strategy Pitchbook](#)

TRADEMARK provides a suite of separate managed account strategies designed to help individuals achieve their investment goals with as little emotional stress as possible. Each of our strategies have varying primary objectives but all have an equal emphasis on the most important aspect of successful investing – avoiding large losses.

## Trademark Investment Strategies

[Tactical Risk Strategy Overview](#)    [Our TRS process](#)

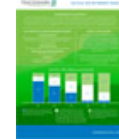
Our flagship, tactical unconstrained, portfolio seeks to participate in equity markets during lower-risk, constructive market environments and staunchly protect our investors' capital in down markets. We utilize exchange traded funds (ETFs) to create and tactically adjust a diversified and balanced portfolio according to current market conditions.

# Trademark

## Retirement



We have a long tradition of helping retirement plan sponsors and plan participants invest for their retirement goals and objectives. Our innovative tactical risk managed solutions are designed to help our clients by mitigating their exposure to destructive market losses.



[Tactical Risk Series Brochure](#)



[Tactical Risk Series Fact Sheet](#)



[Tactical Risk Series Pitchbook](#)



[Cash Balance Pitchbook](#)

## Retirement Plan Strategies

[Trademark Tactical Risk Retirement Series \(CITs\)](#)

[What is a CIT?](#)

[Trademark Cash Balance Strategy \(CBIS\)](#)

[Our CBIS Process](#)

Plan sponsors today are faced with the challenge of choosing the right target-date solution for their participants. While it is important to take into account a TDF's investment objective and glidepath methodology, it is also important to understand the fund's ability to protect participants' retirement savings during times of market volatility.

What makes Trademarks' retirement series unique is our Tactical Risk Overlay – an allocation within each fund designed to provide significant downside protection. While dynamic, the percentage allocated to the Tactical Risk Overlay increases as an investor approaches their retirement age and throughout their golden years.

## About

## Trademark



“It does not matter how frequently something succeeds – if failure is too costly to bear.”

Trademark Capital is a boutique investment management firm that provides tactical ETF portfolio solutions. For over two decades, Trademark’s principals have managed tactical portfolios aimed to maximize wealth by minimizing large losses.

We do not manage strategies to outperform an index or benchmark. We believe our tactical risk strategies reduce the chances of making emotional investment decisions and, in return, may increase investors’ likelihood of meeting their long-term goals.

Trademark offers tactical investment solutions via managed accounts as well as Collective Investment Funds for qualified retirement plans.

## Trademark Team

- Don Beasley  
**Principal & Managing Director** [more](#)
- Joe Ezernack, MBA  
**CEO & Chief Investment Officer** [more](#)
- Kelly Larson  
**Client Services Manager** [more](#)
- Orantes L. Grant  
**Vice President of Advisor Services** [more](#)
- Jay Nauta  
**Senior Vice President of Client Development** [more](#)
- David Denham  
**Investment Advisor Representative** [more](#)

## Connect

### With Trademark

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- Please send me news and info from TRADEMARK

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[back to top](#)

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