



Enduring Investment Strategies for a Dynamic Global Economy

[Learn more about EquityCompass](#)



Download the **EquityCompass
Overview Brochure**



"Our portfolios have the responsibility of addressing their expected risk and reward performance consistent with their investment objective."

"The end client is our invest





A Partner for Financial Advisors

EquityCompass provides advisors with complementary skills, shared responsibility, and common purpose. We seek to protect, preserve, and grow the assets entrusted to us through an enduring commitment to excellence. We drive results by combining our veteran team's experience and talents with premier, client-driven service.

The Drive for Successful Performance

While investment results over time are a result of factors such as asset allocation, risk tolerance, and time horizon, successful performance can be attributed to the investment process or decision-making that helps guide a portfolio to achieving financial goals. At EquityCompass, we dedicate a great deal of time to the investment process because we believe thoroughly researched and consistently applied decision-making has the greatest likelihood of producing successful performance.



Core Portfolios

Core Retirement Portfolio

A multi-strategy approach designed to fund retirement withdrawals by addressing four essential needs: income, capital appreciation, stability, and risk management.

Core Investment Portfolio

A multi-strategy wealth accumulation approach designed to provide: capital appreciation, diversification, and risk management.

Core Balanced Portfolio

(Formerly Tactical Total Core)

An asset allocation strategy that seeks to effectively capture market returns while minimizing volatility and providing downside risk mitigation.

Core Equity Portfolio

(Formerly Tactical Core Equity)

A risk-managed core equity strategy that seeks to exceed the broad equity market returns while minimizing volatility and providing downside risk mitigation.



U.S. Equities

Quality Dividend Fund

QDVAX | QDVCX | QDVIX

A diversified portfolio of high-quality higher-dividend paying stocks that seeks to achieve three main goals: asset preservation, attractive current income and income growth.

Quality Dividend Portfolio

A diversified portfolio of high-quality higher-dividend paying stocks that seeks to achieve three main goals: asset preservation, attractive current income and income growth.

Research Opportunity Portfolio

An opportunistic investment approach based on insights from fundamental equity research.

Select Quality Growth and Income Portfolio

A diversified portfolio of high-quality stocks trading at opportunistic prices that seeks to outperform without taking undue risk.



Global and Alternative Strategies

Global Leaders Portfolio

Focused portfolio of leading global companies positioned to benefit from the unprecedented growth in worldwide consumer demand.

Equity Risk Management Strategy

Tactical allocation strategy that seeks to adjust a portfolio's equity exposure to potentially manage downside risk and volatility control.

EquityCompass Risk Manager ETFs

ERM | TERM

Tactical allocation strategy that seeks to adjust a portfolio's equity exposure to potentially manage downside risk and volatility control.



Learn More

[About EquityCompass](#)

[Core Retirement Portfolio Explained](#)

[Core Investment Portfolio Explained](#)

[Global Leaders Portfolio Explained](#)



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