



## WE MANAGE YOUR INVESTMENTS, BUT MORE IMPORTANTLY, WE MANAGE YOUR INVESTMENT RISK.

Find your true risk tolerance with Potomac and avoid excessive stock market risk in your portfolio. We help people across the country protect their investments with actively-managed, personalized investment strategies.

LET'S TALK

## WHO WE SERVE



### INVESTORS CONCERNED ABOUT MARKET RISK

Generate market returns while putting in place safeguards against extreme market loss from risk you can't afford. Potomac has the knowledge and guidance to keep your financial goals for retirement on track.



### 403(B) PLAN PARTICIPANTS

Have a 403(b) through work but need help managing it? We specialize in helping teachers, doctors, and nurses like you select the right funds to match your risk preference and financial goals.

WORK WITH US

## WHO WE ARE

- We are team of professionals who believe in the strength of small business.
- As a fiduciary and fee-only advisor, we sit on the same side of the table as our clients to educate and deliver risk-managed investment strategies, nationwide.
- We believe most investors can't handle excessive stock market risk and their current investments are likely not aligned with their risk tolerance.
- We build strategies designed to help you invest in a way that helps you reach your financial goals while also protecting you from extreme losses.



## FREE DOWNLOAD: LEARN THE HIDDEN RISKS OF PASSIVE INVESTING

GET YOUR COPY

Most financial advisors push cheap, passive investments, but ignore the effects of risk on your overall return. If you can't afford major losses in your investments, you need to read this report.

## INVESTMENT STRATEGIES

Your goals are the same as ours: reduce investment risk and generate returns. We use a sophisticated process to help us reach those simple, but important, goals. Potomac offers tactical investment strategies that match your risk tolerance and share an underlying goal of avoiding excessive losses.

### CORE



#### INCOME PLUS

This strategy is designed to provide a stable, long-term total return from current income and consistent capital appreciation with a goal of achieving an absolute return under all market conditions.



#### GUARDIAN

This strategy is designed to provide consistent conservative growth and preservation of capital by participating in U.S. and international markets and to limit portfolio volatility and risk of extensive loss.

#### ADVISOR EXPRESS

### EXPLORE



#### HIGH YIELD PLUS

This strategy is designed to provide stable long-term total returns from current income and capital appreciation by participating primarily in high yield bond investments, with a goal of achieving an absolute return under all market conditions.



#### BULL BEAR

This strategy is designed to provide moderate to aggressive growth while participating in U.S. markets both on the long (buy) side and short (inverse) side, and to limit portfolio volatility and risk of extensive loss.



This strategy is designed to provide moderate growth, using the Fidelity Funds universe, while participating in U.S. and international markets and to limit portfolio volatility and risk of extensive loss.



## NAVIGROWTH

This strategy is designed to provide moderate to aggressive growth while participating in U.S. and international markets and to limit portfolio volatility and risk of catastrophic loss.

## KNOWING YOUR TOLERANCE FOR RISK GETS YOU CLOSER TO PROTECTING YOUR INVESTMENTS.

[FIND YOUR RISK SCORE](#)

### HOW WE GET TO KNOW YOU:

To get the right answers you must ask the right questions! We get to know your true risk tolerance by discussing your goals, financial situation and how low your investments can go before you feel uncomfortable.

### HOW WE PUT TOGETHER A PLAN:

We analyze your current holdings and make a recommendation based on your tolerance for risk. If you aren't sure if your current investments align with your risk tolerance, take our questionnaire for a free analysis.

[READ OUR BLOG](#)

[REQUEST A CALL BACK FROM A MEMBER OF OUR TEAM](#)

First Name

Last Name

Phone Number

Email Address

SUBMIT

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