



COMPASS
ACTIVE TACTICAL MANAGEMENT

Discover Your Path To Active Money Management

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Discover Your Path To Active Money Management



It is with great pleasure that I welcome you to the **Compass Active Tactical Management** program.

With over 50 years of combined experience in investment management, our team has been an innovator in bringing Active Tactical Management **to Individuals, Foundations, & Qualified Plans**. Our primary objective is to **create wealth** as well as **protect against principal loss** from severe stock market declines. In the past, this kind of management was only available to institutions or to the wealthiest people.

Our four point approach, utilizing **Technical, Fundamental, Quantitative Analysis, along with Risk Management**, allows us to navigate through all types of market conditions, keeping your portfolio pointed in the right direction.

Our investment process entails identifying Domestic, as well as International Markets, that exhibit the best overall risk to return ratios. We call this the Relative Strength or the "Sweet Spot" of the Markets. We then analyze over 40 sectors or industries, as well as asset classes, to include Small Cap, Mid Cap, and Large Cap. This allows our investors to participate in advancing markets that have passed our proprietary screening. I refer to this as our **Wealth Accumulation** phase.

Unfortunately, there are times when the markets are in high risk and we need to adopt a defense strategy to **Protect Wealth**. In these situations we use Short Term Bonds and Money Markets as safe havens. This is our **Wealth Preservation Phase**.

The only constant is **Change**, and we at Compass are adept at **identifying and modifying your Portfolio** to these changes. We are constantly striving to achieve an absolute return for your portfolios.

There is no guarantee that any investment strategy can protect you from loss 100% of the time. But I do assure you that the emphasis will always be on **creating wealth** in strong markets and preserving **wealth** in weak markets.

Compass is the management firm where **you the client**, will always be **served first**. I encourage you to consider the **Compass Active Tactical Management Program** as an integral component of your investments and retirement.

Discover your path to Active Money Management and become a client of Compass.

This presentation is limited to the dissemination of general information pertaining to its investment advisory/management services. Any subsequent, direct communication by WEG with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. For information pertaining to the registration status of WEG, please contact WEG or refer to the Investment Adviser Public Disclosure website, www.adviserinfo.sec.gov (<http://www.adviserinfo.sec.gov/>).

There is no guarantee that a diversified portfolio will outperform a non-diversified portfolio in any given market environment. Investors whose portfolios are actively managed may incur additional tax liabilities and sales charges.

All investments involve risk, including the potential loss of principal invested. Foreign investments involve special risks including greater economic, political, and currency fluctuation risks, which may be even greater in emerging markets. Lower-rated debt securities (commonly referred to as junk bonds or high-yield) involve additional risks because of their lower credit quality of the securities in the portfolio. The investor should be aware of the possible higher level of volatility, and increased risk of default. Debt securities are sensitive to interest rate changes. When interest rates increase, the value of a debt security tends to decrease.

For additional information about WEG, including fees and services, send for our disclosure statement as set forth on Form ADV. Please read the disclosure statement carefully before you invest or send money.

There are fees associated with accounts managed by WEG.

Past performance does not guarantee future returns.

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