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We believe preserving capital to unleash the power of compounding is the most important element of a successful investment approach.

Our investment management system aims to *tame the bear and run with the bull.*

Will you be ready for the next market cycle?

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Invest With Us

(<https://wbiinvestments.com/what-we-offer/>)

(<https://wbiinvestments.com/what-we-offer/trend-switch/>)

BULL | BEAR TREND SWITCH (HTTPS://WBIINVESTMENTS.COM/WHAT-WE-OFFER/TREND-SWITCH/)

Our WBI Bull | Bear Trend Switch models are a quantitative management system designed to provide trend risk signals indicating bull or bear conditions. "Risk Off" or "Risk On" signals queue equity, bond, or cash allocations to optimize risk and return. Learn more about these SMA models.

[\(https://wbiinvestments.com/what-we-offer/process-bull/\)](https://wbiinvestments.com/what-we-offer/process-bull/)

[BULL POWER FACTOR PROCESS \(HTTPS://WBIINVESTMENTS.COM/WHAT-WE-OFFER/PROCESS-BULL/\)](https://wbiinvestments.com/what-we-offer/process-bull/)

Our Power Factor Strategies unleash the power of WBI's security selection process by maintaining a fully invested approach to maximize return. Check out the unique investment process of these SMA strategies.

[\(https://wbiinvestments.com/what-we-offer/tax-smart-sma/\)](https://wbiinvestments.com/what-we-offer/tax-smart-sma/)

[GET TAX-SMART \(HTTPS://WBIINVESTMENTS.COM/WHAT-WE-OFFER/TAX-SMART-SMA/\)](https://wbiinvestments.com/what-we-offer/tax-smart-sma/)

WBI builds Tax-Smart SMA strategies with proprietary ETFs to actively manage risk and return while helping clients keep more of the return generated after taxes. Learn how.

[\(https://wbiinvestments.com/what-we-offer/products/\)](https://wbiinvestments.com/what-we-offer/products/)

[PRODUCTS \(HTTPS://WBIINVESTMENTS.COM/WHAT-WE-OFFER/PRODUCTS/\)](https://wbiinvestments.com/what-we-offer/products/)

WBI offers a variety of separately managed account strategies and exchange-traded funds to help investors tame the bear and run with the bull. View our full product suite.

DO YOU NEED
INCOME?



02:29
□



NEW EPISODES EVERY FRIDAY

WBI is bringing the fun back to finance with our weekly podcast. Our experts want to help people make informed investment decisions so they can be in better financial shape.



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Let's Play Connect the Dots with...

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Bull|Bear Radio Season 7

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Contact your financial advisor to see how WBI can help you better prepare for your future.

WBI's back office team is standing by to support our advisor partners.

Contact Us

*Hypothetical \$1,000,000 investment.

IMPORTANT INFORMATION

Past performance does not guarantee future results.

All economic and performance information is historical and not indicative of future results. This is not an offer to buy or sell any security. No security or strategy, including those referred to directly or indirectly in this document, is suitable for all accounts or profitable all of the time and there is always the possibility of loss. Moreover, you should not assume that any discussion or information provided here serves as the receipt of, or as a substitute for, personalized investment advice from WBI or from any other investment professional. To the extent that you have any questions regarding the applicability of any specific issue discussed to your individual situation, please consult with WBI or the professional advisor of your choosing. This information is compiled from sources believed to be reliable, accuracy cannot be guaranteed. Information pertaining to WBI's advisory operations, services, and fees is set forth in WBI's disclosure statement in Part 2A of Form ADV, a copy of which is available upon request, or at the IAPD website found here.

At times, market conditions and the particular Portfolio Strategy, may call for an allocation of 100% to cash or cash equivalents. If the portfolio strategy invests all or a substantial portion of its assets in cash or cash equivalents for extended periods of time, including when it is investing for temporary defensive purposes, it could reduce the strategy's potential return as the limited returns of cash or cash equivalents may lag other investment instruments in a strong market.

Net of Fee Performance is net of the maximum WBI investment management fee. WBI uses a model fee approach which consists of netting down 100 bps from gross returns on a monthly basis. Gross of Fee Performance is presented for comparison of manager performance, and excludes the effects of the investment management fees charged by WBI.

Benchmark performance does not include deductions of transaction and custodial charges or investment management fees, which would likely reduce performance results. Because the strategy involves active management of a potentially wide range of assets, no widely recognized benchmark is likely to represent performance of any managed account. WBI managed accounts may own assets and follow investment strategies which cause them to differ materially from the composition and performance of the benchmarks shown. Indices are unmanaged and may not be invested in directly.

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Russell 1000 Index: measures the performance of large-cap U.S. companies. **Russell 2000 Index:** measures the performance of small-cap U.S. companies. **Bloomberg Barclays US Aggregate Bond TR Index:** a component of the US Universal Index and covers the USD-denominated, investment-grade, fixed-rate, taxable bond market of SEC-registered securities.