

STRATEGIC WEALTH ACCUMULATION TACTICS

A TARGETED APPROACH TO INVESTING...

Many portfolios today take a shotgun approach to investing, hoping that they will hit something. The SWAT portfolio takes a focused approach, singling out specific companies that have sound fundamentals and good long term growth prospects.

PURPOSE

This portfolio's aim is to deliver investors exposure to potential equity growth. Top quality companies are targeted for this select portfolio.

STRATEGY

Classic, fundamental stock picking, along with modern technical analysis determine which securities will be included in the SWAT Portfolio. Normally, the strategy has a long term perspective, but it may hold a position for only a few weeks or months, if it has reached its short term objectives.

While not the primary objective, the SWAT portfolio also seeks out strong dividends. Adding cash flow to a portfolio pays the investor while they wait for the investment to grow.

The portfolio may utilize light risk management strategies including the use of stop loss orders and raising cash.

OBJECTIVES

Investments are chosen for both their potential long term growth and/or potential income. Short term instability in the markets can distract an investor. They can rest assured that the companies chosen for this portfolio have solid long term outlooks.

PORTFOLIO PARAMETERS

Objectives:	Growth & Growth & Income
Assets:	Stocks and cash
Equity Classes:	Large & Mid cap & International
Max in any Industry:	50%
Max in any equity:	10%
Risk Management:	Some Stop Losses and Raising Cash
Invested Range:	0% to 100% invested
Stock picking Criteria:	Earnings Growth
	Relative Yld
	News pending
	News Released
	Analysts Ratings
	MACD Charts
	Among others
Target Risk Score:	50 (0 – 100 range)



BENEFITS

By owning top quality companies, investors participate in growth of various leaders of their respective industries. And, when the markets go through their inevitable gyrations, they can rest easier knowing they have top-tier investments.

IS THIS RIGHT FOR ME?

Discriminating investors who want long term growth through a select group of industry leaders should consider this portfolio. The companies chosen are a select group that have proven themselves to be superior with excellent potential for future growth.

Past performance is no guarantee of future results.

Fee based money management and Financial Planning offered through Cornerstone Investment Services, LLC's RIA Diversification does not ensure a profit or guarantee against a loss. There is no assurance that any investment strategy will be successful.