

# 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.

