

**ETF Portfolio Management (ETF PM)** is a financial advisor specialized in investing with exchange-traded funds (ETFs). We customize active and passive investment portfolios for each client account. Client accounts have daily liquidity, full transparency and online access through **Interactive Brokers**. Other custodians may be available upon request. The firm's current new account minimum is \$500k.

<u>ETF PM Strategy</u>	<u>Diversification</u>	<u>Short Capacity</u>	<u>Turnover</u>	<u>Annual Yield</u>	<u>Account Minimum</u>	<u>Advisory Fee</u>
<b><u>Investable Benchmarks</u></b>						
1 ) Income & Growth	Multi-Asset Class	Long-Only	Passive	2.6%	\$500,000	0.25%
2 ) Income & Growth 2x	Multi-Asset Class	Long-Only	Passive	1.8%	\$500,000	0.25%
3 ) Income & Growth 3x	Multi-Asset Class	Long-Only	Passive	2.2%	\$500,000	0.25%
4 ) Income & Tech 3x	Multi-Asset Class	Long-Only	Passive	2.3%	\$500,000	0.25%
<b><u>Absolute Return Strategies</u></b>						
1 ) 50/50 Portfolio	Multi-Strategy	None	Active	1.3%	\$500,000	2.00%
2 ) Tactical 3x	Multi-Asset Class	None	Active	na	\$500,000	2.00%
3 ) Max Alpha	Multi-Asset Class	20% Net	Active	na	\$500,000	2.00%
4 ) Multi-Portfolio	Multi-Strategy	20% Net	Active	na	\$500,000	2.00%

**Note:** Investable benchmark portfolios are comprised of leading ETFs from Vanguard, iShares, ProShares, and Direxion. Annual Yield figures are as of December 31, 2023. na - not available.

For additional information please visit [www.etfpm.com](http://www.etfpm.com).