

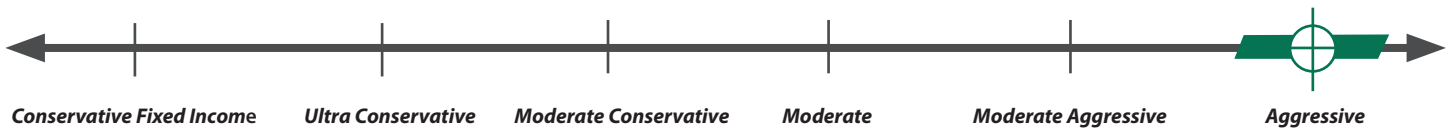


Elite Equity

Strategy Snapshot:

Management Style: Strategic-Active
Composition: Equity (Individual Stocks)
Minimum Investment: \$35,000

Long-term Return Target: (10 years or longer): 10% to 12%
Bull Market Return Target: (similar to 2013 and 2019): 26% to 30%
Bear Market Return Target: -20% to -23%
Maximum Drawdown Expectation (month end): -25% to -28%



DESCRIPTION:

The *Elite Equity* is a core equity strategy designed to generate stable and consistent growth while limiting systemic and market risk—even through recessions.

The goal of this model is to exceed the S&P 500 during Flat or Bear markets, and potentially outperform the S&P 500 during a full market cycle. This is a buy-and-hold strategy with no explicit downside protection, though it is expected to be less volatile than the S&P 500. It is built for long-term growth and capital accumulation.

The *Elite Equity* includes stocks that demonstrate the ability to yield investors a higher rate of return on their investment, exhibit stable earnings growth along with low volatility, and exhibit abilities to limit impact during market recessions.

OBJECTIVES:

- Forward 12-month earnings forecasting with 95% or better certainty;
- Recession-resistance;
- Lower beta vs S&P 500;
- Less drawdown capacity;
- Steady, consistent growth

5 REASONS TO INVEST:

1. More predictability than the overall market;
2. Recession-resistant; demonstrated throughout COVID-19 market impact;
3. Lower market risk vs S&P 500;
4. Reduced historic drawdown capabilities;
5. Higher growth potential relative to its peers

Products distributed by:



Optivise Advisory Services, LLC
 109 Holiday Court, Suite A6, Franklin, TN 37067
 © Optivise Advisory Services. All rights reserved.
 EE-EE-0221

Investment advisory services offered through Optivise Advisory Services, LLC an SEC registered investment advisor. Please note that registration with the SEC does not denote a specific level of skill or guarantee the success of a particular investment strategy. Models with the Elite Equity series have an inception date of 1 November 2020. Any references to prior returns are only attributal to the source portfolio that the Elite Equity models are derived from. While Optivise believes that the Elite Equity series models will maintain the same or better return and risk characteristics of the source portfolio there is limited actual return data. Past performance should not be used as the sole selection criteria for investing.