

# Dynamic, Diversified Investment Allocation

## Bonds:

*Investments we consider include:*

- New or Secondary Treasuries
- Municipals, Corporates and Agencies
- Selected Bonds Funds
- TIPS
- Selected Exchange Traded Funds (ETFs)

## U.S. Stocks:

*Investments we consider include:*

- Individual Stocks
- Index Tracking Investments for example Russell 1000 Value/Growth
- Indexed Investments such as Exchange Traded Funds
- Negatively-correlated Investments
- Preferred Stock

## Non-U.S. Stocks:

*Investments we consider include:*

- American Depository Receipts (ADRs)
- Indexed Investments such as Exchange Traded Funds
- Negatively-correlated Investments

## Non-Correlated Investments:

*Investments we consider include:*

- Commodities
- Currencies
- Cash

## Income Investments:

*Investments we consider include:*

- Bonds & Preferred Stocks
- REITs
- Closed-End Funds

## Opportunistic Investments:

*Investments we consider include:*

- Inflation Protection
- Real Estate
- Negatively Correlated Investments
- Options and Carry Trades

## Investment Personalization:

*DIAS Core portfolios can be personalized to meet specific needs and concerns including:*

- Inflation
- Additional Income
- Large Existing Stock Holdings
- Taxation
- Manage your own Portfolios?

