

Model Goals

- Seek growth primarily through capital appreciation by capturing short-, mid-, or long-term trends
- Seek to reduce investment risk through the use of risk control measures

The Equity Growth Model is intended for investors who:

- Wish to employ an active approach to portfolio management
- Are comfortable with portfolio turnover resulting from active management
- Are comfortable with investments in common stock in domestic and / or global markets

Minimum Account Size: \$75,000

704 Lisburn Road, Suite 101
Camp Hill, PA 17011
(717) 774-7200

www.wealthdevelopmentcouncil.com



Note: This Factsheet is intended to be viewed in conjunction with **WDC Advised Portfolios – An Introduction** brochure.

Model Thesis

- Stocks of businesses that experience higher sales revenues, better profitability, and lower debt than their peers tend to attract investor's capital over time.
- Owning the stocks with these characteristics when those stocks are exhibiting positive Relative Strength Trends potentially positions a portfolio for compelling growth over time.

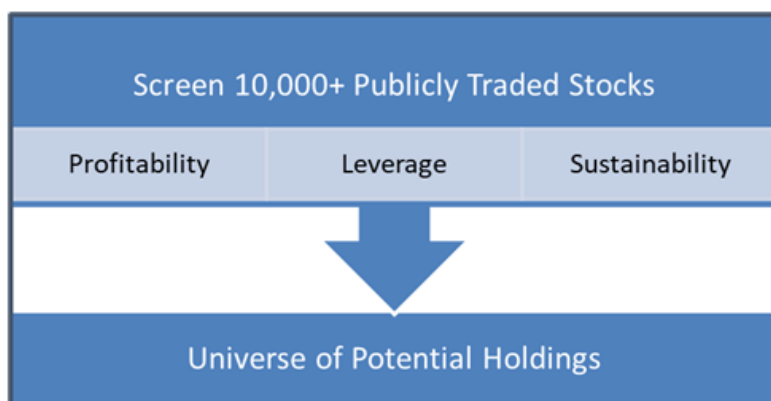
Model Strategy

1	Develop an Inventory of Investment Possibilities
2	Rank each Investment Possibility by Relative Strength
3	Buy or Hold Investment Possibilities which have high relative strength at time of purchase
4	Maintain Risk Controls
5	Monitor and Reallocate as needed

An Inventory of Investment Possibilities

1

Our process begins with screening a broad universe of common stocks in an effort to identify companies with sustainable business models, high Return on Assets relative to their peers, increasing revenues and net margins, low debt ratios, and strong capital positions. Those stocks that are identified through this screening are added to an Inventory of Investment Possibilities. We describe this inventory as the Universe of Potential Holdings.



Equity Growth Model

An investment model based on Fundamentals, Relative Strength, and Market Trends

Relative Strength Journal Sample

	6/30/2016	6/29/2016
<u>1</u>	Kellogg Co. +1	Emerson Electric -4
<u>2</u>	ASML Holding NV +1	Kellogg Co. -2
<u>3</u>	Vornado Realty Trust +4	ASML Holding NV 0
<u>4</u>	Emerson Electric -3	Norfolk Southern +2
<u>5</u>	S&P 500 Equal Weight 0	S&P 500 Equal Weight 0
<u>6</u>	Norfolk Southern -2	Infosys Technologies -2
<u>7</u>	First Trust Technology +2	Vornado Realty Trust +3
<u>8</u>	Infosys Technologies -2	Mondelez International -1
<u>9</u>	National Grid Group +2	First Trust Technology -1

Picking Investment Possibilities

2

3

Universe of Potential Holdings constituents are ranked according

to Relative Strength vs. all other constituents and vs. multiple benchmark indices.

The model seeks to purchase and hold candidates that are in positive Relative Strength Trends and sell candidates that are in negative Relative Strength Trends.

By combining robust financial screens with Relative Strength assessments, the Equity Growth model seeks to hold a portfolio of fundamentally sound companies which are exhibiting high Relative Strength and positive trends at the time of purchase.

Active Management

4

5

Model holdings are reviewed and monitored on an ongoing basis. As securities rise in value, positions may be trimmed to harvest gains. Once a company's Relative Strength begins to weaken, the model will typically begin to sell shares of that company to reduce exposure to that position.

Model diversification is achieved through effective position sizing. Strategic stop and limit orders may be utilized to further reduce risk.

Advisory services offered through WDC Advisors, LLC, a Pennsylvania Registered Investment Advisor.

The information contained herein has been prepared without regard to any particular investor's investment objectives, financial situation, and needs. It is presented for educational purposes as an introduction to an investment strategy. Accordingly, investors should not construe this information as a recommendation (express or implied), nor act on the information contained in this material, without obtaining specific advice from their financial advisors and should not rely on information contained herein as the primary basis for their investment decisions. Relative Strength rankings are created and provided solely by the Wealth Development Council, LLC Advanced Research Platform™. Relative Strength is a measure of price momentum based on historical price activity. A Relative Strength strategy is NOT a guarantee of current or future performance. There may be times where all investments and strategies are unfavorable and depreciate in value. Information contained herein is based on data obtained from recognized statistical services, issuer reports or communications, or other sources believed to be reliable ("information providers"). However, such information has not been verified by Wealth Development Council, LLC (WDC), WDC Advisors, LLC (WDCA), or the information providers. WDC, WDCA, and the information providers make no representations or warranties or take any responsibility as to the accuracy or completeness of any information contained herein. WDC, WDCA and the information providers accept no liability to the recipient whatsoever whether in contract, in tort, for negligence, or otherwise for any direct, indirect, consequential, or special loss of any kind arising out of the use of this document or its contents or of the recipient relying on any such recommendation or information (except insofar as any statutory liability cannot be excluded).

Since market dynamics routinely change, any statements contained in this material constitute only current opinions, which are subject to change without notice. Neither the information nor any opinion expressed shall constitute an offer to sell or a solicitation or an offer to buy any securities, commodities or exchange traded products. Past performance is not a guarantee of future results. Potential for profits is accompanied by possibility of loss. You should consider this Model's strategic investment objectives, risks, charges and expenses before investing. The examples and information presented do not take into consideration Investment Advisory Fees, tax implications, or other potential transaction costs. There are risks inherent in international investments, which may make such investments unsuitable for some clients. Documents containing more complete information about companies represented in the current model inventory are publicly available for free via EDGAR on the SEC website (<http://www.sec.gov>).

© 2023 [Wealth Development Council, LLC](http://www.wealthdevelopmentcouncil.com). All rights reserved.

www.wealthdevelopmentcouncil.com