



## FOOTBALL & OUR INVESTMENT MODEL

A simple and fun analogy for our investment models can be seen in the game of football.

The **53-man roster** is our bench of funds. On a football team, these 53 players are hand selected to fill a variety of positions (offense, defense, special teams), and to give the team the best opportunity to win across any number of scenarios. For us, it is no different aside from the language used. Equities, fixed income, cash, and alternatives are used in place of offense, defense, and special teams – though both are tactical groupings used to accomplish certain goals in certain situations.

Like the football coach then selects a **lineup of 11 players** to be on the field at one time, we then select a limited number of funds to be in our investment portfolios at a given time. In football, this **tactical decision** of who goes on the field is a reflection of who has the most talent, who is at the top of their game, and the game situation, such as: *first and goal, 3rd and short, kick or go for it, and up big or needing to catch up*. You won't see the QB on the field when the team is on defense, nor would you see the kicker on a Hail Mary attempt to win the game. In our investment model, the funds that are put onto **YOUR field** are custom selected to provide you with the **best results for your given situation**.

As market conditions and/or your personal goals change, so will the players on the field – though just as your favorite football team (we hope it is the Seahawks) maintains a singular goal of winning, your “team” (lineup of funds) will always maintain its singular goal of delivering **superior risk-adjusted returns in line with your goals and values**.





## DISCLAIMER

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