

A team you can count on!

EXECUTIVE SUMMARY



GLOBAL VIEW CAPITAL[®]
M A N A G E M E N T

An SEC-Registered Investment Advisor, Global View Capital Management offers a unified managed account program with over 100 managed account strategies offered from 40 institutional money management firms. GVCM is the portfolio manager for GTAC Globalview Tactical Asset Allocation model portfolios. The strategy employed is known widely by institutional firms who have been able to access the broad asset class spectrum globally. The advancements in technology, trading platforms and exchange-traded products have enabled the average investor to access asset classes and trading strategies that were not previously available for the average retail investor until recently. The actively managed, non-correlated strategies, when combined in one simple portfolio, deliver a highly sophisticated form of diversification with an emphasis on downside protection.

Quick Facts

- Over 40 Money Manager Firms
- Over 100 Separately Managed Account Strategies
- Over 80 Focused Fund Selections

Large Account Program

- \$25,000 account minimum
- .50 - 1.0% Program Fee plus Maximum 1.4% Advisor Fee

Small Account Program

- \$2,000 account minimum
- .25 - .75% Program Fee plus Maximum 1.4% Advisor Fee

One Simple Portfolio

INSTITUTIONAL-QUALITY DIVERSIFICATION

*Varies by custodian

Money Managers

Custodians

Investment Advisory Services

- Unified Managed Accounts
- Multi-Strategy Portfolios
- Mutual Fund Wrap Program
- ETF Index Portfolios
- Tactical & Strategic ETF Strategies
- Dimensional Fund Advisors (DFA) Fund Solution
- Variable Insurance Sub-Account Portfolios

Investment Options

- Exchange Traded Funds
- Mutual Funds
- Individual Stocks & Bonds
- Municipal Bonds
- Master Limited Partnerships
- Variable Insurance Sub-Accounts
- Options Strategies

Investment Methodologies

- Tactical Analysis Approach
- Strategic Analysis Approach
- Dynamic Analysis Approach
- Traditional Modern Portfolio Approach

Powered by:



Summit Advisor Solutions (SAS) is an investment and technology platform provider to RIA firms across the country and is owned by FolioDynamix, a firm whose technology, trading, and reporting powers firms with over \$700 Billion in assets. Through its powerful technology platform, advisors can manage the entire client lifecycle from proposal generation to account opening to account management, all through a sophisticated secure cloud-based solution.

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