


TURNKEY ASSET MANAGEMENT MODELS

Models Available on  **ORION**
 PORTFOLIO SOLUTIONS

BALANCED RISK MODEL

The Ocean Park Balanced Risk Model has two investment objectives: provide long-term Total Return and limit downside risk. The Model's multi-asset diversification strategy applies a trailing stop discipline with the objective of limiting the impact of sustained declines.

INCEPTION DATE: 01/02/2004

DIVERSIFIED MUNICIPAL BOND MODEL

The Ocean Park Diversified Municipal Bond Model seeks satisfying long-term returns while aiming to limit downside risk. Interest income from municipal bonds is tax-exempt at the federal level, providing valuable benefit for clients in relatively high income tax brackets.

INCEPTION DATE: 01/04/2016

TACTICAL BOND MODEL

The Ocean Park Tactical Bond Model seeks to produce satisfying long-term returns while aiming to limit downside risk. It uses a tactical approach to move between three uncorrelated asset classes: High Yield Corporate Bonds, U.S. Treasuries, and Cash.

INCEPTION DATE: 11/01/2017

TACTICAL ALLOCATION MODEL

The Ocean Park/AAMA Tactical Allocation Model combines the experiences of two distinct managers: one with a tactical strategy that seeks to produce strong risk-adjusted return and another with a focus on aggressive stock selection. The objective is to participate in equity returns while maintaining a component of downside risk protection. This combination aims to provide participation in the most attractive areas of the U.S. stock market while seeking to incorporate protection against severe declines through tactical participation in all fixed-income asset classes.

INCEPTION DATE: 02/01/2017

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