Introduction to the

DBS Portfolios

Diversified, Balanced, Strategic Investing

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TAMP
Advisory Solutions, LLC

Prelude

"Success in business can be obtained by identifying and exploiting inefficiencies in the competition." – John G. McHugh

The DBS portfolios, managed through the asset management division of TAMP Advisory Solutions, LLC, offer both individual and institutional investors, a customized solution to their investment needs. We provide experienced asset management using a defined process and direct client access to the Chief Investment Officer of the portfolios. While there are many ways in which to measure success, we base the success of our management by how we perform against an assigned "benchmark" for each of our portfolios.

In golf, many players use "par" as a benchmark to judge their performance. Those players who outperform par on a regular basis are considered exceptional. The same can be said for how portfolio managers outperform their assigned benchmark.

Benchmarks (i.e. S&P 500, Russell 2500, and Barclays US Aggregate Bond Index) vary, depending upon the asset mix of a portfolio, but those managers who outperform the assigned benchmark on a long-term basis are considered exceptional.

Because our portfolios are measured against an assigned benchmark index, we view this index as our competition. Fundamental to our success against this competition is the identification of the inefficiencies in the static nature of the stocks within these indexes. Indexes seldom change their holdings, yet many companies within the index underperform.

By using our quantitative approach to stock selection, we hope to identify those underperforming companies and exclude them from our DBS Portfolios. It is our belief that this quantitative approach can result in better performance over time, beating our "competition."

Exploiting Inefficiencies in the Competition – This could be a successful plan in any venture. In the business world, I have found it not only crucial for survival, but beneficial in exceptional portfolio management.

John G. McHugh, President, Chief Investment Officer

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Qualifications

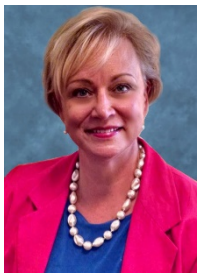
John G. McHugh, President – Chief Investment Officer As the Senior Portfolio Manager of TAMP Advisory Solutions, LLC, Mr. McHugh manages investment portfolios on a discretionary basis for individuals and organizations who are seeking professional portfolio management services.

John and his team have developed investment management strategies using a quantitative approach to investing. He manages assets for individuals, foundations, hospitals, pension plans and other institutions. With more than 25 years of experience in helping investors and 18 years in private portfolio management, he utilizes his extensive knowledge in constructing portfolios with asset allocations for all levels of risk tolerance. His management of these portfolios, and in particular his selection of equities for these portfolios has offered his investors a disciplined approach to investing with proven results.

Mr. McHugh's background includes a B.S. in business from the University of Missouri in Columbia with an emphasis in accounting and finance. Upon graduation in 1973, Mr. McHugh accepted a job with Monsanto Company in St. Louis and eventually rose to his final position of Director of Financial Reporting. During this employment period with Monsanto, Mr. McHugh passed all four parts of the CPA exam on the initial sitting, though he is not currently a practicing CPA. He remained with Monsanto Company until 1988, when he accepted the position of financial advisor with Merrill Lynch's Private Client Group.

In 1994, John joined Oppenheimer, Inc. in St. Louis, and attended DePaul University's School of Commerce completing the portfolio management course study program. Mr. McHugh's management of client portfolios on a discretionary basis began at Oppenheimer, Inc. through their Omega Portfolio Management Program. In 2000, he moved his financial advisory practice to Prudential Securities, a predecessor firm of Wells Fargo Advisors.

Upon leaving Wells Fargo Advisors, John transitioned his investment management practice to his own Registered Investment Advisory (RIA) company, TAMP Advisory Solutions LLC.



Darlene S. Duncan, Senior Vice President – Investment Officer, joins John McHugh as a partner, assisting in portfolio management with a concentration in fixed income securities and technical analysis. A native of Louisville, Kentucky, Darlene brings over 30 years of industry experience. Beginning her career in the mid-1970's with the Kentucky regional firm, Hilliard-Lyons, Darlene's experience as a municipal bond trader offers the group a greater insight to the fixed income markets.

During her long career, she has worked with both regional and national brokerage firms, leaving Wells Fargo Advisors to join John McHugh at TAMP Advisory Solutions LLC. Darlene is the cornerstone of the company, offering knowledge and experience in both an advisory and support capacity.

Investment Philosophy

"The market will fluctuate."
— J. P. Morgan

J.P. Morgan's words are as true today as they were when he uttered them nearly a century ago. The market will indeed fluctuate – and this creates risk. At any given time, certain sectors of the market may perform better than others, and certain companies (even in the same market sector) may do better than others. What does this mean for the investor? It means that they have to find a way to manage the risk of investing in companies or even entire market sectors so that they have broad exposure to stable or rising sectors and limited exposure to unstable or declining ones. Risk is best managed by maintaining a diversified investment portfolio.
Diversification can be achieved on many levels:

• Industry (for example, health care vs. retail)
• Size of company, otherwise known as market capitalization (for example, small cap. vs. large cap.)
• Geography (Domestic vs. foreign-based)
• Growth rate (For example, fast-growing companies vs. mature companies)
• Cyclical or non-cyclical (for example, steel vs. food).

"Don't try to buy at the bottom and sell at the top. It can't be done except by liars."
— Bernard Baruch

Bernard Baruch was famous for getting out of the market before the 1929 crash. He later said that he became concerned when shoeshine boys started giving him stock tips. He also made and lost several fortunes in the market. Studies have shown that successful market timing (even by professional investors) is very difficult to achieve — maybe even impossible over the long-term. In our opinion, the most successful investors are usually fully invested in the market through both up and down cycles. While TAMP Advisory Solutions primarily advocates being fully invested in the market, we also believe that investors should remain flexible in order to take advantage of opportunities when they arise while attempting to mitigate some of the risk associated with the markets

"The return of my money is more important than the return on my money."
— Mark Twain

So, how should an investor allocate his portfolio? What sectors of the market are peaking, falling or rising? How does the investor determine which companies in these sectors to invest in? Who has the time or the expertise to plow through the mountains of information now available? Which analysts or market pundits should they believe in? Before an investor can answer these questions, they need to determine what their tolerance for risk is. Risk means that you may lose some or all of your investment, or that the investment may not gain in value at the desired rate. Diversification can help us reach our goals but of course it doesn't eliminate the risk of fluctuating prices and uncertain returns. In pursuing financial objectives, investors can choose from a wide range of investment alternatives that vary greatly in their degree and type of risk and potential return.

"Don't fall in love with your investment: it won't fall in love with you."
- Dr. Steve Sjuggerud

At TAMP Advisory Solutions, we believe that the long-term market price of a stock is ultimately determined by its ability to generate earnings. Wall Street brokerage firms and independent research firms employ professional equity analysts to estimate the earnings growth of the companies they follow in order to develop their estimate of a company's "fair value" in relation to its current market price. The analysts then determine their Buy, Sell and Hold recommendations for the companies that they follow. For any given stock there may be numerous brokerage analysts following the company and making earnings-per share estimates. These numbers are collected and compared by various services to develop a "consensus" number for Earnings per Share (EPS) for every followed company. In most circumstances, the most recent analyst estimates are the most accurate. When a company announces a quarterly EPS amount that is higher than the consensus number, it is said to have "beat the street number" and may often experience an upward movement in stock price.

"The best way to double your money is to fold it in half and put it back into your pocket."
- Kin Hubbard

At TAMP Advisory Solutions, we believe that the real value of brokerage analyst estimates is not in the current consensus but in the trend of positive or negative changes in the individual brokerage analyst estimates from the former consensus. TAMP Advisory Solutions uses these EPS estimate (1) changes as a buy/sell signal for each company.

"The stock market is a world of its own. Fashion and style are big factors in the price of a stock."
- Seth Glickenhaus

Using an extensive analytical database our proprietary in-depth screening process, TAMP Advisory Solutions' method uses the collective analysis of thousands of analysts following thousands of companies across all market segments to rank prospective companies for its portfolios.

The difficult task at hand is to effectively analyze equities, using reported company data as well as analysts' forecasts for a company's future earnings. We use our own methods and experiences to further analyze and decide if a particular company is a potential portfolio selection or if it meets the criteria to remain in a portfolio, taking into account our in-depth analysis and tactical economic outlook. We perform this additional screening process systematically across all stocks analyzed by our quantitative database.

We believe that this provides a strong, yet dispassionate, buy/sell discipline which assists us in avoiding market fads and helps us find or realize real value in companies across market segments that may be currently out of favor or to lighten up on companies or market segments that may be peaking.

Quantitative Ranking

'Follow the Earnings'

In the early 2000's, John McHugh realized that in order to be an effective portfolio manager, there was a need for a timely reporting of current earnings estimates, and the need to evaluate those estimates prior to their traditional release date to the average financial advisor. He found and subscribed to an extensive database which offers daily updates to earnings and earning's revisions, in addition to other reported financial data, on over 4,000 publicly traded companies.

"I believe that earnings estimates*, and a company's ability to meet those estimates, provide the greatest impact to stock prices." ***John G. McHugh***

These companies are analyzed and ranked on a daily basis using a composite of four factors:

1. **Agreement:** The extent to which all brokerage' analysts are in agreement, revising their earnings estimates[2] in the same direction.
2. **Magnitude:** The larger the percentage increase or decrease in analysts' projected quarterly earnings, the more weight is assigned to an earnings estimate change. For example, a 10% increase in the earnings estimate revision is better than a 2% increase and would carry more weight in the analysis.
3. **Upside:** The deviation between the most accurate earnings estimate issued by the analyst who are believed to have the best track record and consensus earnings estimate.
4. **EPS Surprise:** The occurrence of a company's reported quarterly or annual profits- above or below analysts' expectations.

Once analyzed using the four factors above, a ranking of 1-5 is assigned, with 1 representing a strong buy and 5 representing a strong sell.

1 - Strong Buy – typically only 5% of stocks analyzed receive this coveted rating
2 - Buy – the next 15% (approximately) of stocks analyzed are rated as "BUY"
3 - Hold – the majority of stocks analyzed (approximately 60%) fall into this
4 middle category
5 - Sell – the next 15% (approximately) of stocks analyzed are rated as "Sell"
6 - Strong Sell – the bottom 5% (approximately) of stocks get this rating

*Earnings Estimate – The expectation of a company's quarterly or annual profits as determined by analysts employed by a variety of financial firms and reporting agencies.

DBS Portfolio Selections

TAMP Advisory Solutions offers discretionary portfolio management utilizing our nine (9) DBS investment "sleeves." Investors may choose from one of our standard blends or customize their DBS portfolio by selecting specific DBS investment sleeves. We recommend that you discuss your objectives, risk tolerance, and timeline with your Financial Advisor before you select a DBS Portfolio.

The DBS Sleeves

DBS Equity Sleeves

- **LTGA - Long-Term Growth Allocation**
- **ESEA - Earnings "Surprise" Equity Allocation**
- **PMEA - Price Momentum Equity Allocation**
- **CORE - Equity Allocation**

DBS ETF and Mutual Fund Sleeves

- **EF1000 - Moderate Fixed Income Allocation**
- **EF 2000 - Conservative/Short-term Fixed Income Allocation**
- **EF 3000 - ETF Equity Growth Allocation**
- **EF 4000 - ETF Equity Value Allocation**
- **GOLD - GLD ETF Allocation**

The DBS Standard Blends

DBS Standard Equity Blends – Blends *with* Individual Equities

We have established DBS Standard Blends that are client favorites. The actual allocation for each may vary, dependent upon the portfolio manager's opinion of market conditions and at the portfolio manager's discretion. As such, percentage allocations are approximate and should be used for general informational purposes only. An allocation of cash and the DBS GOLD sleeve may be utilized in each portfolio.

DBS Conservative Income and Growth Portfolio (30/70)

A blend of approximately 30% DBS Equities and 70% DBS Conservative Fixed Income. **Investment objective for this blend is preservation of principal, with conservative fixed income as the primary and growth as the secondary objective**.

DBS Conservative Growth and Income Portfolio (50/50)

A blend of approximately 50% DBS Equities and 50% DBS Conservative Fixed Income. **Investment objective for this blend is preservation of capital with growth and conservative fixed income.**

DBS Standard Equity Blends - continued

DBS Moderate Growth and Income Portfolio (60/40)

A blend of approximately 60% DBS Equities and 40% DBS Moderate Fixed Income. **Investment objective for this blend is primarily growth and moderate fixed income.**

DBS Total Return Portfolio (70/30)

A blend of approximately 70% DBS Equities and 30% DBS Moderate Fixed Income. **Investment objective for this blend is primarily growth with moderate fixed income as a secondary objective.**

DBS Long Term Growth Portfolio (85/15)

A blend of approximately 85% DBS Large Cap Equities and 15% DBS Moderate Fixed Income. **Investment objective for this blend is long term growth with modest fixed income as a secondary objective.**

DBS Long Term Equity Growth Portfolio (All Equity)

A blend of approximately 100% DBS Equities. **Investment objective for this blend is long term growth.**

DBS Standard ETF & Mutual Fund Blends – Blends *without* Individual Equities

The DBS Standard ETF/Mutual Fund Blends have been created by combining our DBS EF Equity Portfolios and our DBS EF Fixed Income Portfolios. No individual equities are held in these blends.

ETF Equity Growth & Income Blends

EF Blend Name	*EF 3001*	*EF 3002*	*EF 3003*	*EF 3004*	*EF 3005*	*EF 3006*
Approximate Position Selection Weighting	**EF 3000:** 70% **EF 1000:** 30%	**EF 3000:** 50% **EF 1000:** 50%	**EF 3000:** 30% **EF 1000:** 70%	**EF 3000:** 70% **EF 2000:** 30%	**EF 3000:** 50% **EF 2000:** 50%	**EF 3000:** 30% **EF 2000:** 70%

ETF Equity Value & Income Blends

EF Blend Name	*EF 4001*	*EF 4002*	*EF 4003*	*EF4004*	*EF 4005*	*EF 4006*
Approximate Position Selection Weighting	**EF 4000:** 70% **EF 1000:** 30%	**EF 4000:** 50% **EF 1000:** 50%	**EF 4000:** 30% **EF 1000:** 70%	**EF 4000:** 70% **EF 2000:** 30%	**EF 4000:** 50% **EF 2000:** 50%	**EF 4000:** 30% **EF 2000:** 70%

Information about the DBS Investment Sleeves

There are currently nine (9) DBS Investment Options which we refer to as "sleeves." These sleeves can be **stand- alone** investments or, as traditionally is the case, they may be **combined** – mixed and matched – to create a portfolio that offers an optimal blend for our investors.

At the Chief Investment Officer's discretion, and depending upon market conditions, equity allocations may be composed of individual equities, or may be more tactical in nature, utilizing ETFs and/or mutual funds.

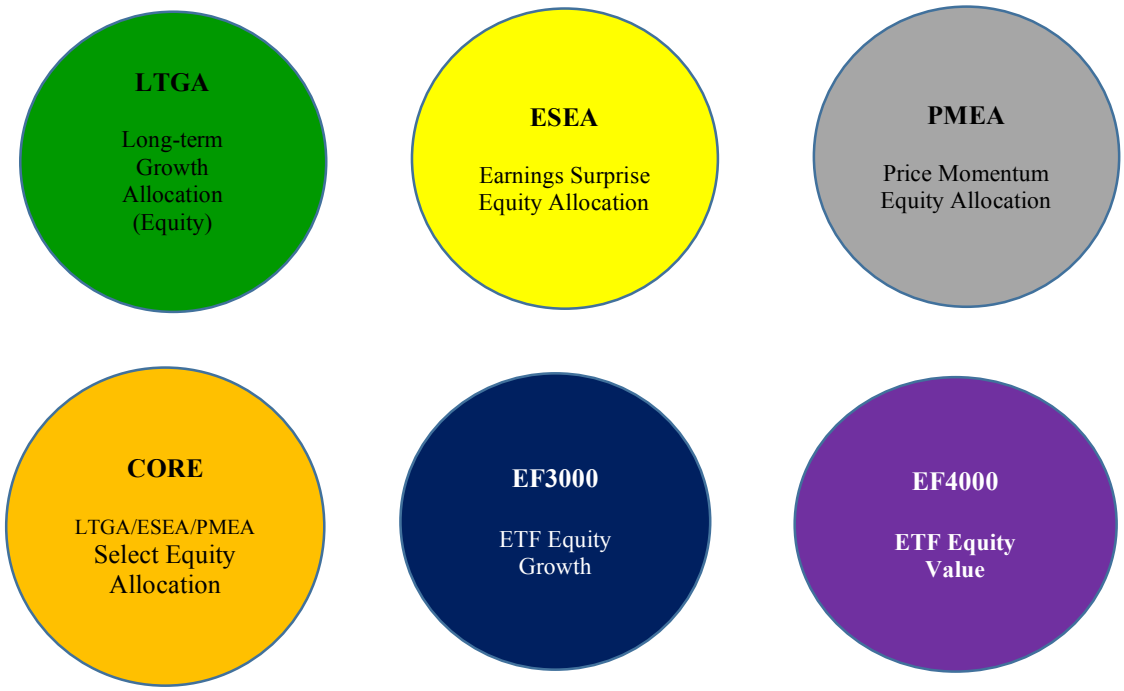
The optimal blend for your portfolio will depend on your objectives, risk tolerance, and investment timeline.

DBS Equity Sleeves

Six sleeves are available for our equity investors, four of which hold individual equity positions. Individual equities selected for these DBS Portfolios share our principals of fundamental investment selection: Identifying and purchasing shares of companies whose recent earnings estimate revisions are increasing, regardless of the economy, and selling the shares of those companies whose earnings estimate revisions are deteriorating, regardless of the economy. These strategies involve shares of U.S.-Based, global corporations as well as U.S. market-listed shares of foreign-based corporations.

Although our allocations with individual equities all start with a fundamental base, they each utilize unique investment strategies. Our Long-term Growth Allocation is based on our standard principals of quantitative investment selection, our Earnings Surprise Equity Allocation is based on narrow earnings and revenue criteria, and our Price Momentum Equity Allocation focuses on technical price momentum.

DBS EQUITY SLEEVES



DBS Equity Sleeves - continued

DBS Long Term Growth Allocation (LTGA) The LTGA Equity Allocation is comprised of approximately 20-25 primarily large-cap and other dividend-paying stocks, and has long-term growth as its investment objective. Turnover for the this strategy is relatively low.

DBS Earnings "Surprise" Equity Allocation (ESEA) Each calendar quarter, we analyze approximately 2,000 companies from all capitalization groups, looking for companies that beat their current quarterly revenue and earnings estimates, that guide up for their next quarter's earnings and which, we believe, will offer above-average short-term growth. The result of this search typically yields 10 companies. These companies meet the rigorous ESEA quantitative screens, but may or not meet the quantitative investment criteria of our LTGA. ESEA selections are typically purchased after earnings are announced, therefore eliminating a current negative earnings surprise.

DBS Price Momentum Equity Allocation (PMEA) There is a saying in our industry that the movement of any market on a given day is based on supply and demand. When the market is up – it is said that there is more demand. When the market is down – more supply. This simple supply/demand economic principal is the foundation of our PEMA allocation. Technical analysis of a company's price movement is the focus of this allocation. We look for stocks that are showing relative strength vs. the market and their peers. Fundamental analysis helps tell us *what* to buy and sell. Technical analysis helps tell us *when* to buy and sell.

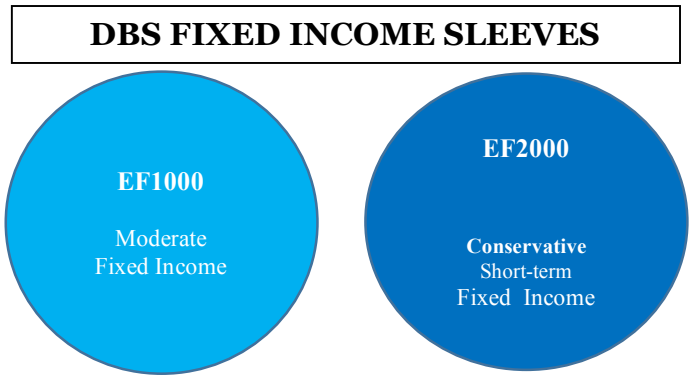
DBS CORE Equity Allocation This flagship portfolio is comprised of selected equities from our DBS Long-term Growth Allocations (LTGA), Earnings "Surprise" Equity Allocation (ESEA), and Price Momentum Equity Allocation (PMEA) Portfolios, with long term growth as its investment objective. There are approximately thirty to forty stock positions in this portfolio strategy at any given time., selected from equities we believe show value, growth potential and/or have a history of dividends to their shareholders.

EF3000, Equity Growth: This equity-focused strategy seeks to provide above average capital appreciation, utilizing a combination of U.S. Large, Mid-Cap and Small-Cap ETFs.

EF4000, Equity Value: This equity-focused strategy seeks to provide a stream of regular income through the payment of cash dividends. We start with a combination of global broad market and value style ETFs that have historically paid regular cash dividends. The ETF positions are weighted and re-balanced favoring the companies paying the highest dividends over the past 12 months. Please note that dividends can be eliminated, raised or reduced by a company without notice.

DBS Fixed Income Sleeves

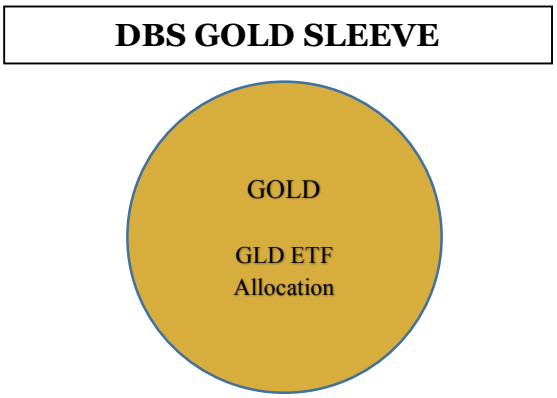
The fixed income portfolios seek diversification through a blending of maturities and credit qualities that we feel are in favor in relation to the current interest rate environment and/or macro-economic environment.



EF1000, Moderate Fixed Income: This fixed-income focused strategy is designed for an investor with a Moderate-Income investment objective and has an emphasis on overall yield with the potential for some capital appreciation. This portfolio may employ Exchange Traded Funds ("ETFs"), Closed End Funds, and Open End Funds to achieve this objective.

EF2000, Conservative Fixed Income: This fixed-income focused strategy designed for an investor with a Conservative Income investment objective has an emphasis on preservation of capital with the potential for modest capital appreciation. This portfolio employs Mutual Funds to achieve this objective.

DBS GOLD Sleeve



GOLD Allocation (GLD ETF)

This DBS Sleeve utilizes SPDR Gold Shares (GLD) as an investment hedge to more traditional investments. GLD is the largest physically backed gold exchange traded fund (ETF) in the world and allows investing in this asset class without having to own the physical commodity. It has long been believed that investing in precious metals (like gold) can provide an investment hedge as, historically, the price of gold has responded differently to economic events when compared to other asset classes such as equities or fixed income.

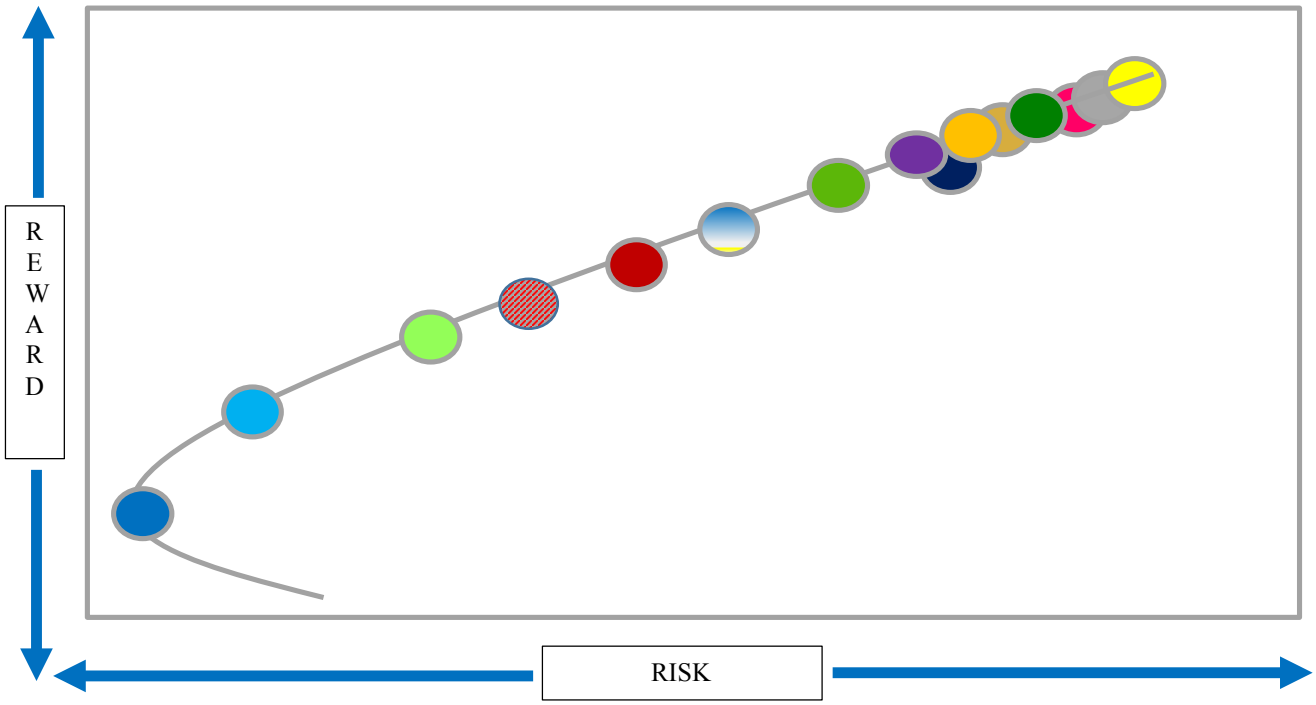
Risk and the Efficient Frontier

All investors have objectives or goals, such as seeking income, growth & income, growth, or trading and speculating. All investors also have risk tolerance, which is the amount of risk of loss they are willing and able to tolerate in order to achieve their investment goals. Higher risk investments may have the potential for higher returns, but also have the potential for greater losses. Generally speaking, investment objectives are on a spectrum, with "Income" investors generally holding the smallest percentage of higher risk investments and "Trading and Speculation" investors holding the largest percentage of higher risk investments. Similarly, risk tolerances are on a spectrum such that an investor with a "Conservative" risk tolerance will accept less risk than an investor with a "Moderate" risk tolerance; a "Moderate" investor less than a "Long-term" investor; and a "Long-term" investor less than a "Trading & Speculation" investor.

No investment is without risk. Even cash, which seemingly has no risk, is subject to the risk of inflation, producing lower purchasing power during years of inflation. Bonds are subject to risk from inflation, interest rates, economic/geographical changes, tax law changes, and debt service coverage. Equities, which are perceived to have the greatest risk and which, in the past, have provided the greatest total return for long-term investors, have risk from the markets, industry groups, economic/geographical changes, tax law changes and the company's success.

In the early 1950's, a gentleman by the name of Harry Markowitz developed a concept called the "efficient frontier." In its simplest terms, this concept states that a portfolio's risk/return ratio might be reasonably determined by the asset mix contained within that portfolio. This theory has helped advisors and their clients construct an optimal blend of equities and fixed income that would best align with the client's risk tolerance and goals for a given portfolio.

Illustrated below is the Efficient Frontier with a selection of the DBS Portfolios plotted. Percentages are approximate. This is intended to be illustrative in nature and may not be reflective of the risk/reward of the equity list or ETF portfolio at any given time.



DBS CORE
GOLD (GLD ETF)
Long-term Growth Allocation (LTGA)
Earnings "Surprise" Equity Allocation (ESEA)
Price Momentum Equity Allocation (PMEA)

ETF/MUTUAL FUND FIXED INCOME
EF1000 ETF Moderate Fixed Income
EF2000 ETF/Mutual Fund Conservative Fixed Income

Conservative Income & Growth (30/70)
Conservative Growth & Income (50/50)
Moderate Growth & Income (60/40)
Total Return Blend (70/30)
Long Term Growth (85/15)
Long Term All Equity Growth

ETF EQUITY
EF3000 ETF Equity Growth
EF4000 ETF Equity Value

Investment Objectives and Risk Tolerance

TAMP Advisory Solutions is focused on helping you determine an investment strategy that will present you with the opportunities to help you achieve your goals, while helping to mitigate some of the downside risk inherent to the markets. Tantamount to this process is determining which portfolio is most appropriate, given your goals and objectives, time horizon, financial means and tolerance for risk.

Below are descriptions of the combined Investment Objective and Risk Tolerance, listed in order of least aggressive to most aggressive for both (Investment Objective and Risk Tolerance) categories. Please carefully consider your Investment Objective and Risk Tolerance for your account.

<table>
<tr><th colspan="6">INVESTMENT OBJECTIVES</th></tr>
<tr><td rowspan="4">RISK TOLERANCE</td><td></td><td>Income</td><td>Growth & Income</td><td>Growth</td><td>Trading & Speculation</td></tr>
<tr><td>Conservative</td><td>Conservative Income investors seek the maximum amount of income consistent with a modest degree of risk. They are willing to accept a lower level of income in exchange for lower risk. Higher risk investments, such as high yield bonds and some equities, are typically not a large percentage of the account.</td><td>Conservative Growth & Income investors seek the maximum growth and income consistent with a relatively modest degree of risk. They are willing to accept lower potential returns in exchange for lower risk. Equities, generally dividend paying equities, may be some percentage of the account.</td><td>Conservative Growth investors seek maximum growth consistent with a relatively modest degree of risk. They are willing to accept lower potential returns in exchange for lower risk. Equities may be a significant percentage of the account.</td><td rowspan="3">Trading and Speculation investors seek out maximum return through a broad range of investment strategies, which generally involve a high level of risk, including potential for significant loss of investment capital.</td></tr>
<tr><td>Moderate</td><td>Moderate Income investors seek to balance the potential risk of capital loss with increased income potential. Higher risk investments, such as high yield bonds and some equities, may be some percentage of the account.</td><td>Moderate Growth & Income investors seek to balance the risk of capital loss with higher potential growth and income. High yield bonds and equities, generally dividend paying equities, may be a significant percentage of the account</td><td>Moderate Growth investors seek to balance the potential risk of capital loss with their goal of higher potential growth. Equities may be the primary asset in the account.</td></tr>
<tr><td>Long-Term</td><td>Long-term Income investors seek a significant level of income, are financially able and willing to risk losing a substantial portion of investment capital, and, due to their long-term horizon or other factors, they employ higher risk strategies that may offer higher potential income. Higher risk investments, such as high yield bonds and some equities, may be a significant percentage of the account.</td><td>Long-term Growth & Income investors seek a significant level of growth and income, are financially able and willing to risk losing a substantial portion of investment capital, and due to their long-term horizon they pursue high risk, more aggressive strategies that may offer higher potential returns. High yield bonds and equities, generally dividend paying equities, may be the primary assets in the account.</td><td>Long-term Growth investors seek a significant level of growth, are financially able and willing to risk losing a substantial portion of investment capital, and due to their long-term time horizon, they employ higher risk, more aggressive strategies that may offer higher potential returns. Higher risk investments such as equities may be as much as 100% of the account</td></tr>
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Investment Objectives and the DBS Portfolios

Our investment sleeves and standard blends are designed to meet the needs of a wide spectrum of investors. Customized blends are also available.

Investment Objectives and the DBS Portfolios				
		Income	**Growth & Income**	**Growth**
RISK TOLERANCE	**Conservative**	• EF 2000 (Cons Fixed Income)	• EF3003 • EF3006 • EF4003 • EF4006 • DBS Cons Income & Growth • DBS Cons Growth & Income	N/A
	Moderate	• EF 1000 (Moderate Fixed Income)	• EF3002 • EF3005 • EF4002 • EF4005 • DBS Moderate Growth & Income	• EF4000 (Value)
	Long-Term	N/A	• EF3001 • EF3004 • EF4001 • EF4004 • DBS Large Cap Growth Portfolio • DBS Total Return	• DBS Long Term Growth • EF3000 (Growth) • DBS CORE • DBS Earnings "Surprise" • DBS Price Momentum • DBS Long-Term All Equity Growth

The "17 Point Check" and your Equity Portfolio Review

Informed Decisions Begin with an
Equity Portfolio Review

Our vast quantitative database provides the foundation for our stock analysis system. In order to analyze the categories, we feel are important, we put the quantitative database through our own screening process, drilling down and placing weight on categories and changes we feel most important After screening and analyzing the data, we compile seventeen categories, or "points," we feel most important into a report we call "17 Point Check."

Q: What is a "17 Point Check" Equity Portfolio Review (EPR)?

A: An EPR is a powerful planning tool that provides investors and their advisors with the information necessary to help effectively structure their equity portfolio to meet their desired goals. It consists of an evaluation of the investor's equity positions to help determine whether the investor's investment performance goals, risk tolerance and equity asset allocation are being effectively met. Alternative strategies may be discussed that seek to improve a portfolio's performance, manage risk and provide a more diversified portfolio of appropriate growth, capitalization or investment income.

Q: What are the benefits of an EPR?

A: Determine Goals, Analyze Diversification, Ascertain Risk Tolerance, and Evaluate Alternative Strategies

To Determine the Investor's Goals – An EPR begins with an investor interview by their Advisor and initial portfolio evaluation. We believe that a clear understanding of the investor's goals and desired outcome will provide the foundation for formulating a suitable portfolio to address the investor's specific needs.

To Analyze the Diversification and Correlation of the Current Equity Portfolio – Having a thorough understanding of the scope and types of risk concentration helps investors and their advisors determine an appropriate alternative. Through our analysis, we will help you understand the benefits of a truly diversified equity portfolio in seeking their investment goals, while managing equity portfolio risk.

To Ascertain the Investor's Risk Tolerance – The EPR can help provide insight into the investor's perceived risk tolerance and help the investor and their advisor understand how to structure a portfolio to assist them in achieving their desired outcome.

To Evaluate the Different Types of Strategies Available – The EPR is designed to provide an understanding of the available equity investment options given the investor's unique goals, risk tolerance and objectives. It will also help illustrate how our strategies can help them diversify their equity portfolio by size of company, industry, growth rate, and income potential; all while working to manage risk and seek better potential performance that the investor may achieve on their own.

IMPORTANT DISCLOSURES REGARDING THE DBS PORTFOLIO STRATEGIES

Mutual Funds and Exchange Traded Funds are subject to risks similar to those of stocks. Investment returns may fluctuate and are subject to market volatility, so that an investor's shares, when redeemed or sold, may be worth more or less than their original cost.

Investments and investment strategies contained are provided for informational purposes only. We would need to review your individual situation before recommending appropriate strategies to you. Stocks offer long-term growth potential, but may fluctuate more and provide less current income than other investments. Fixed income investments may be worth less than original cost upon redemption or maturity. The DBS Portfolios may not suitable for all investors.

The prices of mid-cap company stocks are generally more volatile than large company stocks. They often involve higher risks because mid-cap companies may lack the management expertise, financial resources, product diversification and competitive strengths to endure adverse economic conditions.

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DBSBooklet.C.06.2018