



The Value of Professional Investment Management

Today's investors are well aware of the potential rewards of equity investing. But most people lack the time and expertise needed to make sound day-to-day investment decisions.

The Legend Group

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Choosing the right investment for your goals can be difficult, as there are literally thousands of options available. The task of selection is compounded by the fact that investments are influenced by continually changing global market conditions.

Market volatility is a recurring phenomenon that can often be minimized with a well-diversified portfolio. However, monitoring market events and their effects on your investments can be a full-time occupation. It's no wonder many investors turn to professional investment management services for assistance in creating and maintaining their investment portfolios.

Legend Advisory Corporation's *Strategic Asset Management* (SAM) service was designed to make professional asset allocation techniques, investment selection and ongoing investment management available to individual investors. SAM features five actively managed mutual fund portfolios with objectives that range from conservative to aggressive. In line with each model's objective, the portfolios seek to hold an optimal mix of mutual funds with the potential to maximize returns while minimizing risk.

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Dynamic Money Management

The portfolios are monitored regularly and rebalanced when appropriate in order to capitalize on market opportunities and attempt to avoid market downturns. Legend Advisory Corporation's investment advisory team employs cutting-edge artificial intelligence technology in the ongoing management of the SAM portfolios. This technology is used to:

- monitor domestic and international markets
- track economic trends
- compile data on market activity and expectations from sources from around the world
- analyze individual investments and asset classes
- analyze mutual fund families and performance
- evaluate risk and reward relationships and
- allocate assets to reflect market opportunities

Built-in Diversification

Our strategic partnerships with many prominent mutual fund companies provide SAM clients with access to the expertise of world class money managers. The SAM accounts hold a variety of mutual funds that have been hand-picked for inclusion by Legend Advisory Corporation's team of investment advisors.

The SAM portfolios offer three levels of diversification:

- by Asset class – equities, fixed income and cash
- by Investment type – i.e. large cap, small cap, value and growth
- by Fund management style– securities selection by individual mutual fund managers

Such diversification ensures that the SAM portfolios are strategically positioned to minimize the effects of market volatility on your assets, based on your investment objectives.

Personal Service, Expert Advice

Opening a SAM account is simple. The process begins with a personal consultation with your Legend Advisor to establish a complete understanding of your financial objectives, expectations and risk tolerances. Based on a thorough analysis of your investor profile, your Advisor will recommend the SAM portfolio that best suits your goals. Once your account is funded, you will receive quarterly statements detailing the performance of your investments. The statement will include a summary of portfolio activity as well as a breakdown of your investments by asset class. As you progress toward your investment goals, your Legend Advisor is always available to discuss your portfolio or answer any questions you may have.

Contact your Legend Advisor today and begin enjoying the peace of mind that comes with knowing a team of experienced professionals is working to make your investment experience rewarding.

Securities offered through Legend Equities Corporation, member NASD and SIPC. Advisory services offered through Legend Advisory Corporation, a registered investment advisor. Before investing in a mutual fund, consider its investment objectives, risks, charges and expenses carefully. The prospectus, which contains this and other information about the mutual fund, can be obtained by contacting Legend Equities Corporation. Please read the prospectus before you invest or send money.

Local Office: