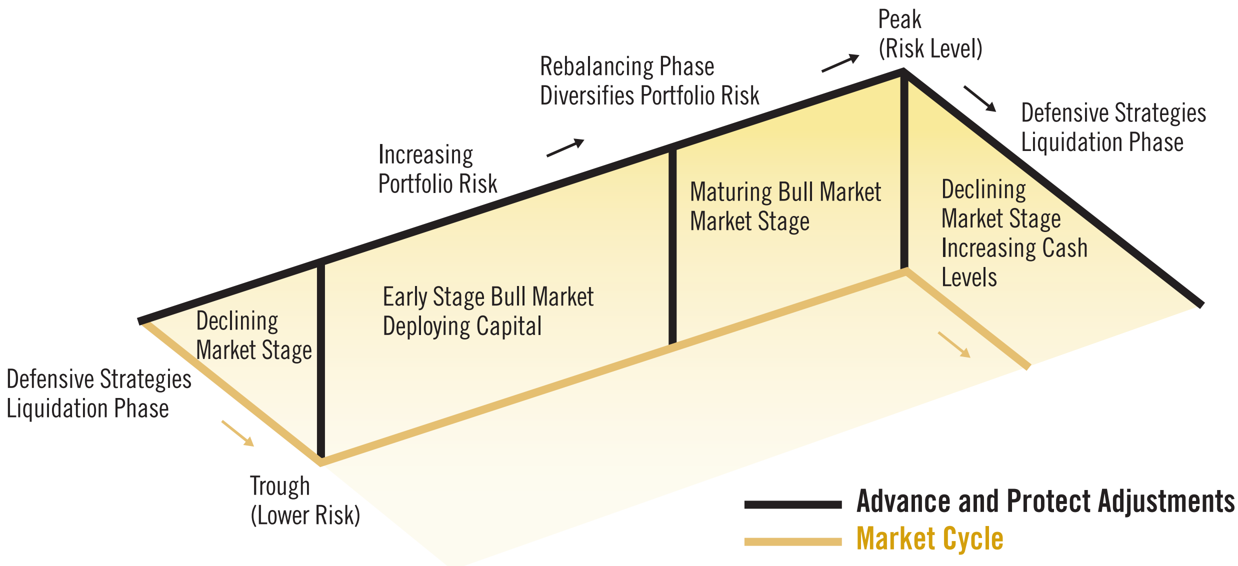
Ingram FINANCIAL GROUP

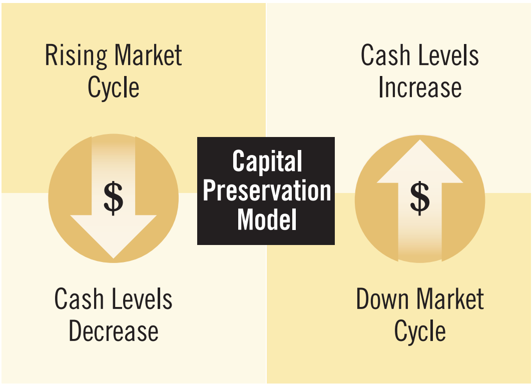
Wealth Management | Investments | Insurance

Advance and Protect Strategy

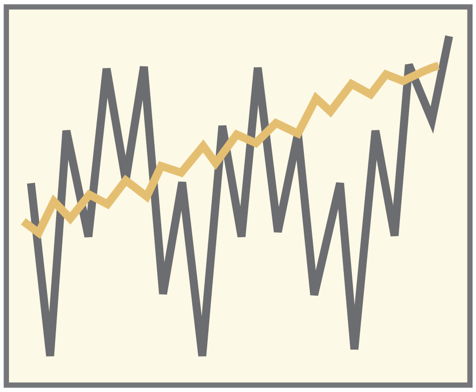
Let's face it; investing only works if one sells and takes profits before they erode. Investing 101 tells us to buy low and **sell** high, not buy and hold forever. Too many times we hear, "Just hang in there; it will come back." That is great **if** one can wait long enough for their assets to recover. The markets and economy go through constant up and down cycles. If one retires or needs their capital, and the markets happen to be in one of these inevitable down cycles, it could be painful.



The **Advance and Protect Strategy** is a capital preservation model with an offensive strategy. Its primary directive is to control risk. The only objective is to capture growth when the market is rising and protect capital when the market is falling. We use qualitative and quantitative strategies to help achieve this goal. Qualitative strategies include a deep understanding of the fundamental trends in the economy, markets and instruments in which we invest. Quantitative strategies include a vast number of metrics which reveal entry and exit points that may not be obvious with fundamental analysis alone. This rigid buy and sell discipline is the crux and foundation of the **Advance and Protect Strategy**. This process automatically changes your allocation mix as the business cycle evolves.



- Cash is a position
- Cash balances risk
- Advance and Protect is about attempting to stair step account values forward, not about beating benchmarks
- We focus on goals we set together and work towards these.



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