



GREAT LAKES

WEALTH



DIGITAL ASSETS STRATEGY

We're entering a new age of technology where it encompasses every aspect of our lives. Machines will learn and think for themselves; solving problems we couldn't. Blockchain's optimization of transactions is helping facilitate digital currency operations, which will modify the way we exchange and invest. Cybersecurity protects our digital world as it becomes as important as the physical. The Digital Assets Strategy invests in the pioneers leading us into this new world.

Digital Assets Strategy: technology & innovation focused. high risk, potential high return

Objective

Our Digital Assets Strategy seeks to produce an investment solution which will increase purchasing power over a complete market cycle by investing in digital assets. Technology investments related to Artificial Intelligence (AI), Blockchain, Cyber Security, Financial Technology (FinTech), and Cellular Mobile Communications/5G are our primary areas of consideration. We expect to invest primarily through liquid securities, including: stocks, ETFs, mutual funds, etc., but may not exceed 20% in any one equity position. The portfolio may also invest up to 25% in private equity related to digital assets technology.

Key facts

Asset Class/Market Cap:
Equity/All Cap

Geographic Exposure:
Global

Benchmark:
NASDAQ – 100%

Investment strategy

This strategy utilizes our proprietary research techniques to find global stocks, ETFs, mutual funds, and other primarily liquid investments. Our proprietary methodology and execution not only creates short-term investment opportunities within the portfolio but, more importantly, reduces the amount of risk taken. We also believe our thematic asset allocation tilts and active rebalancing will reduce volatility and add to the total portfolio return over the long-term. As a portfolio hedge, we may invest up to 25% of the portfolio in non-technology themed securities.