


## 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 to limit 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 limiting 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 limiting 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 expertise of two distinct managers: one with a tactical strategy that produces strong risk-adjusted return and another with strength in aggressive stock selection. The objective is to participate in equity returns while maintaining a component of downside risk protection. This combination allows participation in the most attractive areas of the U.S. stock market while providing protection against severe declines through tactical participation in all fixed-income asset classes.

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