Strategic Portfolio Series

Overview

The Strategic portfolios are strategic asset allocation portfolios designed to deliver a balance of income and growth across a variety of risk profiles. Clarus offers three different Strategic portfolios, each targeting a different risk profile: Conservative, Moderate, and Growth.

The Strategic portfolios take advantage of ETF and mutual fund investments to achieve exposures to different asset classes, ultimately adding value through the selection of these funds and the allocations assigned to each. The portfolios seek a mix of domestic equity, international equity, and diversified fixed income exposure, with weightings to each category assigned to target specific risk profiles.

The Strategic portfolios are rebalanced on a discretionary/opportunistic basis, with fund selection reviews and asset allocation reviews taking place on a quarterly basis. Allocations are built to be closely competitive to each portfolio's targeted benchmark. The appropriate investing time frame is generally 3-5 years. The investment minimum is $20,000.

Strategic Portfolio Offerings

Below you'll find a table of each Strategic portfolio offering, describing how the general asset allocation is weighted, the primary goals of each approach, and the risk level.

Strategic Portfolio	Equity Exposure Target	Fixed Income Exposure Target	Income Generation	Capital Growth	Risk Level
Strategic Conservative	40%	60%	Moderate	Low/Moderate	Conservative
Strategic Moderate	60%	40%	Low/Moderate	Moderate	Moderate
Strategic Growth	80%	20%	Low	High	Moderately Aggressive

Summary

Investment Style:	*Strategic*
Methodology:	*Asset Allocation*
Asset Category:	*ETFs, Mutual Funds*
Risk Level:	*Varied*
# of Holdings:	*10-16*
Investing Time Frame:	*3-5 Years*
Portfolio Minimum:	*$20,000*
Benchmarks:	*Morningstar Moderately Conservative Target Risk (Conservative), Morningstar Moderate Target Risk (Moderate), Morningstar Moderately Aggressive Target Risk (Growth)*