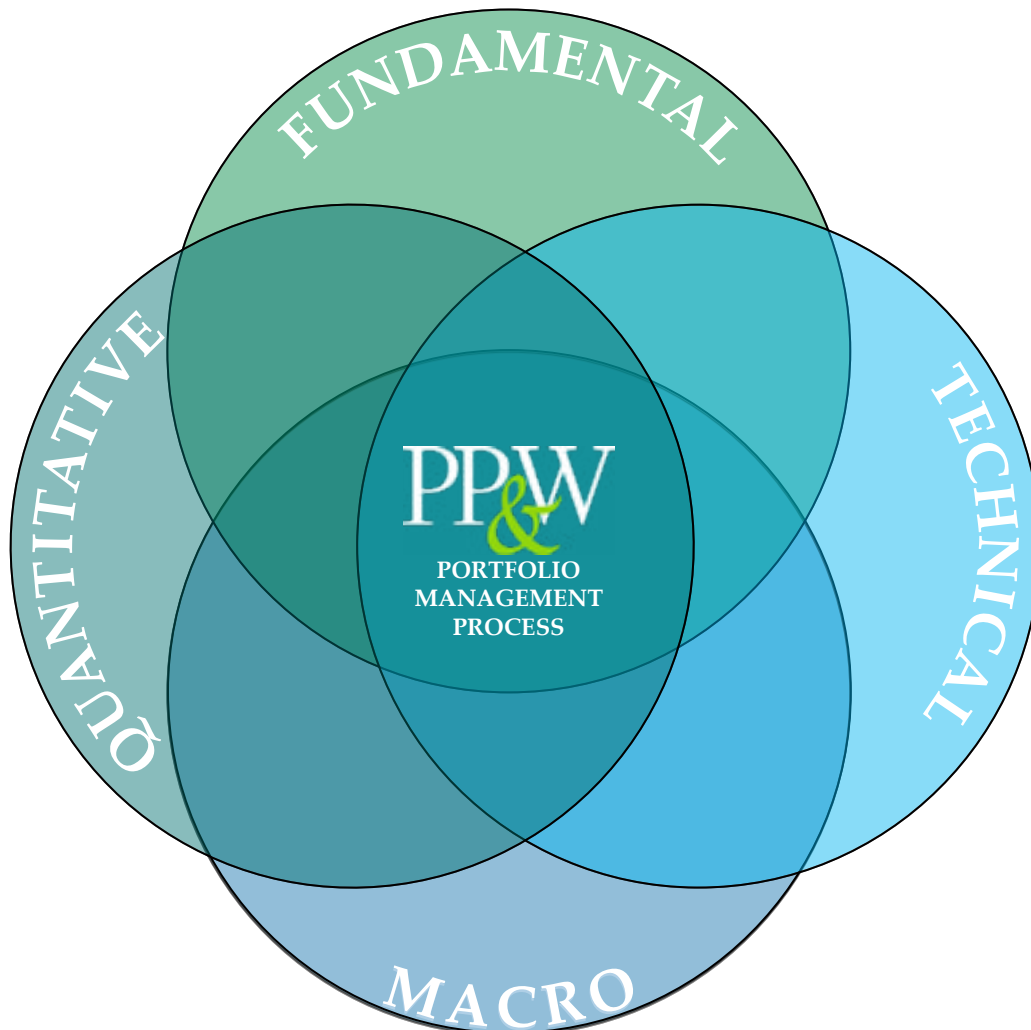


# PROFESSIONAL PLANNING & WEALTH

## RESEARCH FOR RISK MANAGEMENT

### Our Portfolio Management Process

Professional Planning & Wealth applies the four primary market analysis disciplines to portfolio management.



#### FUNDAMENTAL ANALYSIS

Fundamental Analysis is the analysis of a business's health, growth prospects and relative comparison to competitors as well as external factors such as interest rates, employment, GDP, inflation, etc. in order to determine an investment's real or "fair market" value.

#### TECHNICAL ANALYSIS

Technical Analysis is a trading discipline that focuses on the behavior of the market itself, specifically price trends in multiple timeframes. While fundamental analysis focuses more on the cause, technical analysis focuses on the effect – the price action of a potential investment.

#### MACRO ANALYSIS

Macro analyzes the shifts in the macroeconomic environment, which are primarily affected by the forces of growth and inflation, both of which rise and fall. The combination of these forces affect asset classes in various ways, and Macro works to create appropriate asset allocation based on the regime we find ourselves in.

#### QUANTITATIVE ANALYSIS

Quantitative Analysis is a technique that uses mathematical and statistical modeling and measurement to understand markets and the potential for risk, and to inform asset allocation strategy.