The 7Twelve® Portfolio

7 Broad Asset Categories, 12 Funds

<table>
<thead>
<tr>
<th>Eight Equity and Diversifying Funds</th>
<th>Four Fixed Income Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>65% of Overall Portfolio Allocation</td>
<td>35% of Overall Portfolio Allocation</td>
</tr>
</tbody>
</table>

---        |              |             |           |           |             |           |
Large US Stock  | Developed Non-US Stock  | Real Estate  | Natural Resources  | US Bonds  | Non-US Bonds  | Cash       |
Small Cap US Stock  |                           |                           |                     |           |             |           |

Performance updates for the 7Twelve are available on [www.7TwelvePortfolio.com](http://www.7TwelvePortfolio.com)
Past performance does not guarantee future performance

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7Twelve® 2023 Order Form

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<thead>
<tr>
<th>2023 7Twelve® Portfolio Big Research Report</th>
<th>$250</th>
<th>Initial Purchase ☐ $250</th>
</tr>
</thead>
<tbody>
<tr>
<td>60+ page pdf report with fund selection guidance and in-depth analytics for five 7Twelve models (Active, Passive, Vanguard, Fidelity, Schwab). Designed for financial advisors and intrepid investors.</td>
<td></td>
<td>Annual Renewal ☐ $150</td>
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<table>
<thead>
<tr>
<th>2023 7Twelve® Portfolio Short Reports</th>
<th>$75</th>
<th>Vanguard ☐ $75</th>
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</thead>
<tbody>
<tr>
<td>PDF research reports with specific fund selection guidance for each particular mutual fund family or focus area plus extensive performance reporting. All the specific fund or ETF tickers used in the respective 7Twelve model are provided in each report.</td>
<td></td>
<td>Fidelity ☐ $75</td>
</tr>
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<thead>
<tr>
<th>2023 FiveFUNDS Investment Model (NEW in August 2023)</th>
<th>$75</th>
<th>FiveFUNDS ☐ $75</th>
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</thead>
<tbody>
<tr>
<td>This report introduces a model that utilizes 5 ETFs to cover the US equity market—from mega cap to microcap. This is an all-equity model. The goal of this model is to minimize the impact of market cap weighting that is dramatically evident in the S&amp;P 500 Index.</td>
<td></td>
<td>New Economy ☐ $100</td>
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<thead>
<tr>
<th>2023 New Economy Portfolio Report</th>
<th>Powerpoint ☐ $200 initial purchase</th>
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</thead>
<tbody>
<tr>
<td>Specific guidance for advisors and investors wanting to build an aggressive portfolio using ETFs that focus on Ecommerce, biotech, global technology, etc. This is a 100% equity portfolio.</td>
<td>Powerpoint ☐ $100 renewal</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>2023 7Twelve® Educational Powerpoint</th>
<th>$200</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu-driven powerpoint with 140+ slides for client or personal investor education.</td>
<td>initial purchase</td>
</tr>
</tbody>
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<thead>
<tr>
<th>2023 Vanguard 7Twelve® Report for High Net Worth Investors</th>
<th>Vanguard High Net Worth 7Twelve Report ☐ $100</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-page detailed research report outlining the funds to use to build an index-based Vanguard 7Twelve model and an actively managed Vanguard 7Twelve model.</td>
<td></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>2023 7Twelve® ACTIVE ETF Portfolio Report</th>
<th>Active ETF ☐ $100</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-page pdf with specific fund selection guidance for advisors and investors wanting to build the 7Twelve model using 24 actively managed ETFs.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2023 Retirement Portfolio Analyzer Spreadsheet</th>
<th>$200</th>
<th>2023 Retirement Portfolio Analyzer Initial Purchase ☐ $200</th>
</tr>
</thead>
<tbody>
<tr>
<td>Powerful Excel template that allows the user to evaluate retirement portfolio accumulation and retirement income distribution over dozens of rolling &quot;investor lifetimes&quot; between 1926-2022 using 4 asset classes. Asset allocation, portfolio expenses, age of client, and withdraw rate are controllable by the user. RMD analysis available in the spreadsheet. Retirement portfolio analysis also available for 7 asset classes from 1970-2022.</td>
<td></td>
<td>2023 Retirement Portfolio Analyzer Renewal Purchase ☐ $100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2023 7 Vanguard Funds for Life</th>
<th>$100</th>
<th>7 Vanguard Funds for Life Report ☐ $100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific guidance to build a diversified Vanguard-based portfolio suitable for the pre-retirement AND retirement years. This report is an ideal companion to the Retirement Portfolio Analyzer spreadsheet.</td>
<td></td>
<td></td>
</tr>
</tbody>
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$100 for renewal purchases

An Excel template developed by Craig L. Israelsen that allows the user to evaluate retirement portfolio retirement income distribution over dozens of rolling “investor lifetimes” between 1926-2022.

Asset allocation percentages, portfolio expenses, age of the investor, historical performance of asset classes, and withdraw rate are controllable by the user. RMD analysis also available in the spreadsheet.


Improvements in May 2023 release:

* Updated “Cash Flow” tab allows for staggering of Social Security starting year for each spouse, “Other” income column added for misc. sources of retirement income
* Ability to specify each year’s % withdrawal rate during the 25-year withdrawal period
* Ability to enter social security benefits for a spouse in the “Cash Flow” tab
* Ability to compare two portfolios side-by-side in a new 7-assets tab
Become a 7Twelve Partner today and enjoy an outstanding, comprehensive support package built to meet the specific needs of innovative, thoughtful financial advisors. Our mission is to help you get, keep, and grow your advisory business using the widely-regarded 7Twelve methodology as an underlying framework for your investment portfolios.

7Twelve Partners enjoy many benefits, including:

- Monthly performance analytics for 7Twelve Indices (calculated by S&P Dow Jones) & underlying asset classes
- Client-facing talking points for 7Twelve Indices and component asset classes
- Advisor-focused deep dive webinars hosted by Craig Israelsen and Lunt Capital
- Client/prospect-ready, white-labeled 7Twelve marketing materials
- Regularly updated mutual fund and ETF tickers to implement 7Twelve
- Updated investment research from Dr. Craig Israelsen
- Approved, limited use of the 7Twelve registered trademark
- Authorized use of 7Twelve-related journal article reprints

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Advisors who join 7Twelve Partners are provided monthly performance summaries and detailed analytics for the 7Twelve index and the twelve underlying asset classes. The summaries and analytics include valuable, timely, client-facing “talking points” to assist advisors as you talk with clients during performance reviews or as other questions about the underlying asset classes emerge. These reports and analytics help you stay current with the performance and unique characteristics of each asset class.

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Each quarter, 7Twelve Partners have access to a 60-minute webinar hosted by Dr. Craig Israelsen and Lunt Capital Management, Inc. Each webinar is dedicated to various aspects of asset allocation, macro market outlook, and specific research aspects related to the 7Twelve portfolio. These webinars are designed to provide advisors with the timely analysis and discussion needed to stay current with 7Twelve.

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7Twelve Partners are well-versed in the theory and methodology of 7Twelve... but what about actually implementing the approach and selecting or recommending the “right” investment options for your client portfolios? Affiliated members have access to regularly updated mutual fund and ETF ticker “opportunity sets.” The tickers included are reviewed and analyzed by Craig Israelsen and Lunt Capital to ensure they’re a good way to achieve the desired asset class exposure.

Receive Dr. Israelsen’s Regularly Updated 7Twelve Research
7Twelve Partners are provided periodic updates of 7Twelve research reports and 7Twelve powerpoint slide decks. As favorite tools among advisors for years, these materials can be used in your marketing efforts to help illustrate and explain the core concepts of the 7Twelve methodology and approach. These reports include specific information about funds and ETFs that may be utilized in the 7Twelve portfolio.

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