

AN ACTIVE APPROACH



ARE YOU ACTIVE?

Staying active is just as important to your financial well-being as it is to your health. With market risk a constant threat to your capital, we're firm believers that having an active management approach is a pillar of investment success.

At WBI, it's simple. Protecting your capital is **our number one priority**. Getting all the return doesn't mean much if your capital base isn't protected from devastating losses like we've seen before. That is why we combine smart security selection with unwavering risk protection, to give investors the best chance of achieving their financial goals.

SMART SECURITY SELECTION

WBI's time-tested Power Factor® security selection software screens thousands of domestic and international stocks every night to find the companies with the strongest quality fundamentals and the highest dividend yields. This approach requires a stock to be a reasonable value, have positive revenue and earnings trends, and have positive price momentum to buy. Valuation, momentum, and fundamental trend hurdles can help prevent us from buying stocks high as the market cycle deteriorates.



RISK PROTECTION



Our risk management system applies a goal and a proprietary dynamic trailing stop to each invested position. As a security appreciates towards the goal, the stop tightens in an effort to reduce risk and systematically harvest gains. The stop is not a market or limit order stop placed with a brokerage firm. The risk management and trading system is internally managed to increase the quality of execution. Cash becomes a tactical weapon, first minimizing loss and second, allowing you to buy stock low.



THE ACTIVE EQUATION

In our experience, human emotion can derail an investor's financial success. WBI's quantitative management system removes the danger of human emotion from the investing equation. Our uniquely active process is designed to keep us invested when market trends are favorable or to build cash when conditions indicate a high degree of risk with a low probability of success. We believe we have changed the active equation: Protect capital and maintain high-quality security selection coupled with the compounding power of dividends.

The time is now to put emotion aside. **Tame the Bear. Run With the Bull.®**

IMPORTANT INFORMATION

Past performance does not guarantee future results. This is not an offer to buy or sell any security. No security or strategy, including those referred to directly or indirectly, is suitable for all accounts or profitable all of the time and there is always the possibility of loss. You should not assume that any discussion or information provided here serves as a substitute for personalized investment advice from WBI or any other investment professional. If you have questions regarding the applicability of specific issues discussed to your individual situation, please consult with WBI or your chosen professional advisor. This information is compiled from sources believed to be reliable, accuracy cannot be guaranteed. WBI's advisory operations, services, and fees are in the Form ADV, available upon request.

The WBI Dynamic Trailing Stop (DTS) is not a stop loss order or stop limit order placed with a brokerage firm, but an internal process for monitoring price movements. While the DTS may be used to initiate WBI's process for selling a security, it does not assure that a particular execution price will be received.

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