

STEP 1

Investment Goals

- General Goal(s)
- Present Status
- Investment Performance Needed to Reach Goals
- Investment Challenges/Keys
- Time Frame

STEP 5

Monitoring & Reporting

- Fundamental Change
- From Static (Buy & Hold)
- To Dynamic (Active) Management
- Online Access

STEP 2

Portfolio Status

- Overall Risk as Funds are Rated
- Asset Allocation Analysis
- Performance
- Maximum Acceptable Draw Down (Fluctuation)



STEP 4

Recommendation & Adjustment

- Portfolio Additions
- Portfolio Deletions
- Portfolio Re-allocations
- New Investments Options
- Timing

STEP 3

Strategy Review

- Short term
- Allocation Opportunities
- Allocation Liabilities
- Exit Strategy

Active Money Management

Pensionmark Retirement Group uses Active Money Management techniques to assist our clients win by not losing. By utilizing management strategies that minimize loss in down markets and captures most of market increases, we help our clients respond to market variations.

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