

DEPAOLO & MAY

— STRATEGIC WEALTH —

INVESTMENT STRATEGIES

Kyle DePaolo, Principal
Dane May, Principal

Strategies

Enhanced Income (EI)

A strategy for those seeking a higher yield than money market funds, CDs and typical bond ladders. EI focuses on shorter-dated, high-quality bonds and incorporates structural option income to enhance total yield.

By mitigating drawdowns and tactically navigating market challenges like inflation and credit deterioration, EI aims to provide a resilient fixed-income solution in today's volatile rate environment.



Key Points

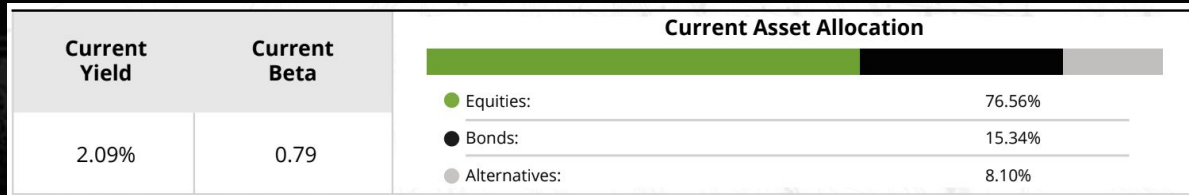
- Ideal for 1-3 year goals
- Optimized for tax-advantaged income
- No lock-up periods or maturity dates - intraday liquidity
- Maintains core positions in short-term, high quality bonds
- Options income overlays help to enhance yield without adding credit or duration risk
- High yield bonds are hedged using options and factor-based strategies

Strategies

Enhanced Growth (EG)

A comprehensive strategy for investors seeking growth with active risk management. Asset allocation, depending on the environment, can be balanced/diversified or, at specific times, concentrated to take advantage of idiosyncratic opportunities.

With its active risk management approach and strategic positioning, EG serves as a holistic portfolio solution, aiming to identify and achieve growth in today's complex environment.



Key Points

- New age take on the balanced portfolio that seeks to help overcome today's toughest asset allocation challenges
- Diversification through equities, fixed income, uncorrelated alternatives and real assets
- Strategic market positioning based on the current economic environment. Identifying macro trends to identify lucrative opportunities as they arise

Strategies

Aggressive Growth (AG)

An aggressive strategy designed to outperform broad market indices over full market cycles. AG employs a tactical equity allocation and the select application of leverage to enhance returns over time. The strategy generally does not diversify outside of equity assets, with the exception of digital currency.

Equity allocation, depending on the environment, is generally diversified across sectors, but larger tilts can be applied to specific market segments when timely.

Current Yield	Current Beta	Current Asset Allocation	
0.75%	1.16		
		● Equities:	78.29%
		● Leveraged & Options-Enhanced Equities:	19.85%
		● Digital Currencies	1.86%

Key Points

- Aggressive portfolio suitable for investors with a long-term time horizon
- Maximum equity exposure, enhanced with sector/industry portfolio tilts
- Select leverage is applied to preferred sectors/indices via options and ETFs to boost returns over time

Strategies

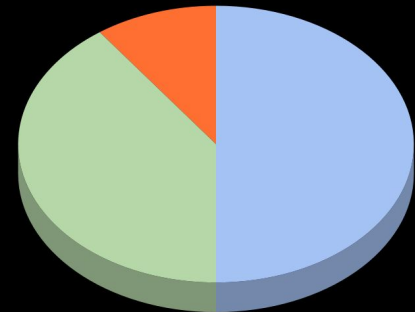
Multi-Strat

Designed for investors who are looking for different outcomes for different portions of their capital, or who find their goals/risk-tolerance in-between our core strategy offerings.

We can apportion investor capital across several of our three strategies to align with your goals.

For example: a portfolio consisting of 50% Enhanced Income (EI), 40% Enhanced Growth (EG) and 10% Aggressive Growth (AG) could be optimal for an individual focused on growing their capital but also needing a reliable income stream to meet their lifestyle.

● Enhanced Income ● Enhanced Growth ● Aggressive Growth



Disclosures

DePaolo & May Strategic Wealth makes no representations or warranties as to the accuracy, timeliness, suitability, completeness, or relevance of any information presented herein. DePaolo & May Strategic Wealth has used its best efforts to verify the data included. However, DePaolo & May Strategic Wealth cannot guarantee the accuracy or completeness of the information offered. The information presented was obtained from sources deemed to be reliable. All expressions of opinion reflect the judgment of the authors as of the date of publication and are subject to change.

This publication does not involve the rendering of personalized investment advice nor is it intended to supplement professional individualized advice. All questions about and/or explanations regarding the content of this publication should be directed to DePaolo & May Strategic Wealth.

Hiring and working with an Investment Advisor or Financial Planner, diversifying your portfolio, and/or developing a financial plan is no guarantee of investment success, and does not ensure that a client or prospective client will experience a higher level of performance or results. Investment success can never be guaranteed. All investments and investment strategies have the potential for profit or loss. The risk of investment loss cannot be eliminated.

Tax law is complicated and not easily calculated. Although we try and estimate it as well as we can, tax calculations should be considered general in nature. Always consult with a legal or accounting professional regarding your specific situation before acting on anything referenced herein. DePaolo & May Strategic Wealth is not engaged in the practice of law or accounting.

Disclosures

Past performance may not be indicative of future results. Therefore, no current or prospective client should assume that the future performance of any specific investment or strategy, or product made reference to directly or indirectly, will be profitable or equal to past performance levels. Future financial conditions and events can never be predicted with complete accuracy, to the extent they can be correctly predicted at all. No analysis, plan, or report has the ability to entirely predict the future.

Any direct or indirect references to specific securities, security sectors, or investment vehicles made in this report should not be taken as a recommendation or solicitation to buy or sell a particular security or invest in any specific investment strategy. There is no guarantee that any of the information or investment strategies discussed will be suitable or profitable.

DePaolo & May Strategic Wealth is a registered investment adviser with the state of California and may only transact business with residents of this state, or residents of other states where otherwise legally permitted subject to exemption or exclusion from registration requirements. Registration with the United States Securities and Exchange Commission or any state securities authority does not imply a certain level of skill or training.

References to Partners & Technology, including but not limited to Charles Schwab, Right Capital, Trust & Will, Orion Advisor Technology, and Holistiplan, are not intended to be an endorsement of DePaolo & May Strategic Wealth by any of the aforementioned companies.