The 7Twelve® Portfolio

7 Broad Asset Categories, 12 Funds

Eight Equity and Diversifying Funds  
- 65% of Overall Portfolio Allocation

Four Fixed Income Funds  
- 35% of Overall Portfolio Allocation

---|---|---|---|---|---|---
Large US Stock | Developed Non-US Stock | Real Estate | Natural Resources | US Bonds | Non-US Bonds | Cash
Midcap US Stock | Emerging Non-US Stock | Commodities | Inflation Protected Bonds
Small Cap US Stock

Performance updates for the 7Twelve® are available on www.7TwelvePortfolio.com
Past performance does not guarantee future performance

To purchase 7Twelve products:

Please mail in the Order Form on next page or email me at: craig@7TwelvePortfolio.com

7Twelve products are sent via email in pdf format, Excel format, or PowerPoint format.
### 7Twelve® 2020 Order Form

**You can order now, however the 2020 reports will be ready starting January 13th, 2020**

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<thead>
<tr>
<th>Product Description</th>
<th>Initial Purchase</th>
<th>Annual Renewal</th>
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<tbody>
<tr>
<td><strong>2020 7Twelve® Portfolio Big Research Report</strong></td>
<td>$250</td>
<td>$150</td>
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<tr>
<td>60+ page pdf report with fund selection guidance and in-depth analytics for a variety of 7Twelve models (Active, Passive, Vanguard, Fidelity, Schwab). Designed for financial advisors and intrepid investors.</td>
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<tr>
<td><strong>2020 7Twelve® Portfolio Short Reports</strong></td>
<td>$75 per report</td>
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<td>(12-17 pages) 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>
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<td><strong>2020 7Twelve® Educational Powerpoint</strong></td>
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<td>Menu-driven powerpoint with 200+ slides for client or personal investor education.</td>
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<td><strong>2020 Vanguard 7Twelve® Report for High Net Worth Investors</strong></td>
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<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. Both models require $120,000 initial investment, for a total of $240,000.</td>
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<tr>
<td><strong>2020 7Twelve® ACTIVE ETF Portfolio Report</strong></td>
<td>$150</td>
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<tr>
<td>14-page pdf with specific fund selection guidance for advisors and investors wanting to build the 7Twelve model using 24 actively managed ETFs.</td>
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<tr>
<td><strong>2020 “35 Lifetimes” Retirement Portfolio Analyzer</strong></td>
<td>$250</td>
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<tr>
<td>Excel template developed by Craig L. Israelsen that allows the user to evaluate retirement portfolio accumulation and retirement income distribution over 35 rolling “investor lifetimes” between 1926-2019 using 4 asset classes. Asset allocation, portfolio expenses, age of client, and withdraw rate are controllable by the user. RMD analysis also available in the spreadsheet. Retirement portfolio analysis also available for 7 asset classes from 1970-2019.</td>
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(4) After receiving your payment, I email you the reports.
Screen shot from the

Excel-based

35 Lifetimes Retirement Portfolio Analyzer

$250

An Excel template developed by Craig L. Israelsen that allows the user to evaluate retirement portfolio accumulation and retirement income distribution over 35 rolling “investor lifetimes” between 1926-2019 and “26 retiree lifetimes” between 1970-2019.

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 the 2020 release:

* Asset allocations can be different during accumulation and distribution periods
* Starting age of the investor can be changed (between 35-69)
* Amount of money already in retirement savings can be specified
* All graphs now on one screen
* Historical performance for the 4 asset classes and 7 asset classes can be adjusted (to create a “less optimistic” view of the past...based on a less optimistic view of future performance)
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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

For additional details about the many benefits enjoyed by advisors who join 7Twelve Partners, please review the extended descriptions below.

Monthly 7Twelve Analytics & Talking Points for Client Meetings
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.

Quarterly, Advisor-Focused Webinars Hosted by Craig Israelsen and Lunt Capital
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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Regularly Updated Mutual Fund & ETF Tickers to Implement 7Twelve

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.

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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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• Get – Capture new business
• Keep – Deepen existing relationships
• Grow – Increase your profitability

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