

# Tactical Growth Strategy

## Objective

**Tactical Growth Strategy** is designed to seek long-term capital appreciation, offering investors a diversified allocation across multiple growth and income generating asset classes. This strategy is for investors who have a high-risk tolerance and a long-time horizon for their investments.

## Selection Process & Approach

The strategy invests primarily in Exchange Traded Funds (ETFs) across multiple asset classes. The strategy invests in growth assets in favorable market environments and scales to conservative assets such as cash or fixed income to preserve gains.

- 1. Determine Equity Exposure.** Maximize growth potential while reducing volatility when risk outweighs return.
- 2. Select ETFs** with market and sector exposures that can potentially provide solid returns.
- 3. Manage Risk.** Continuously monitor positions to ensure appropriate investment exposure.

## Strategy Overview

- Market exposure adjustments and disciplined risk management are the key components to the Tactical Growth Strategy.
- Incorporating a hands-on tactical asset allocation solution can potentially generate solid growth and reduce volatility.

## Process Outline

1. Determine Equity Exposure

2. Select ETFs

3. Manage Risk

\*\*Investment advice offered through Desla Wealth Management, a registered investment advisor.

\*\*There is no assurance any strategy will be profitable or protect against loss. Investing involves risks including loss of principal. There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not protect against market risk.

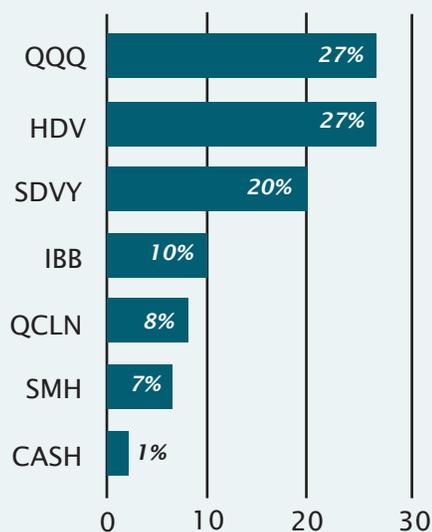
\*\*\*See reverse side for important disclosures

## Annual Management

Amount Invested	Cost
< \$100,000.00	1.50%
\$100,000.00 - \$249,999.99	1.25%
\$250,000.00+	1.00%

\*Minimum investment is \$50,000.00

## Top Ten Holdings



\*Data shown as of 06/25/2024



## Management Team

*taking care of you like family*

### Portfolio Manager

Dean Khatib

### Industry

2010

### Desla Wealth Management

2015



1080 Jordan Creek Pkwy, Suite 202C  
West Des Moines, IA 50266

T: 515-452-0001

DESLAWEALTH.COM

\*\*Investment advice offered through Desla Wealth Management, a registered investment advisor.

\*\*There is no assurance any strategy will be profitable or protect against loss. Investing involves risks including loss of principal. There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not protect against market risk.