Dynamic Advisor Solutions

Dynamic Wealth Advisors

BUILDING THE BRAND

Brand positioning, creation & communications

(Q4 2019-PRESENT)

BRAND POSITIONING

POSITIONING STATEMENT:

For **successful wealth advisors looking to elevate their practices to the next level,** Dynamic Advisor Solutions is a **professional services provider,** delivering a **complete business solution,** including front, middle and back office, integrated platform, compliance and portfolio services.

Unlike other professional service providers for wealth advisors, Dynamic provides the **people, resources and technology** wealth advisors need to create efficiencies so they can focus on providing exceptional client experiences. Dynamic's **people-first service model** creates foundational support: Professionals across all areas of financial services do the work for advisory practices, alleviating the need for staffing, handling client administrivia and guiding advisors in an ever-evolving fiduciary world.

BRAND POSITIONING

TAGLINE:

Elevate your practice.

ABOUT DYNAMIC:

Dynamic Advisor Solutions is a professional services provider for successful wealth advisors who value independence and desire to take their practices to the next level. With Dynamic's complete business solution, myVirtualPractice,™ focus on your clients, own your business and live the life you've always wanted. Build your dream, your way.

Dynamic™
Advisor Solutions

Dynamic™
Wealth Advisors

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RECREATING THE BRAND

FOR ADVISORS

Dynamic™
Advisor Solutions

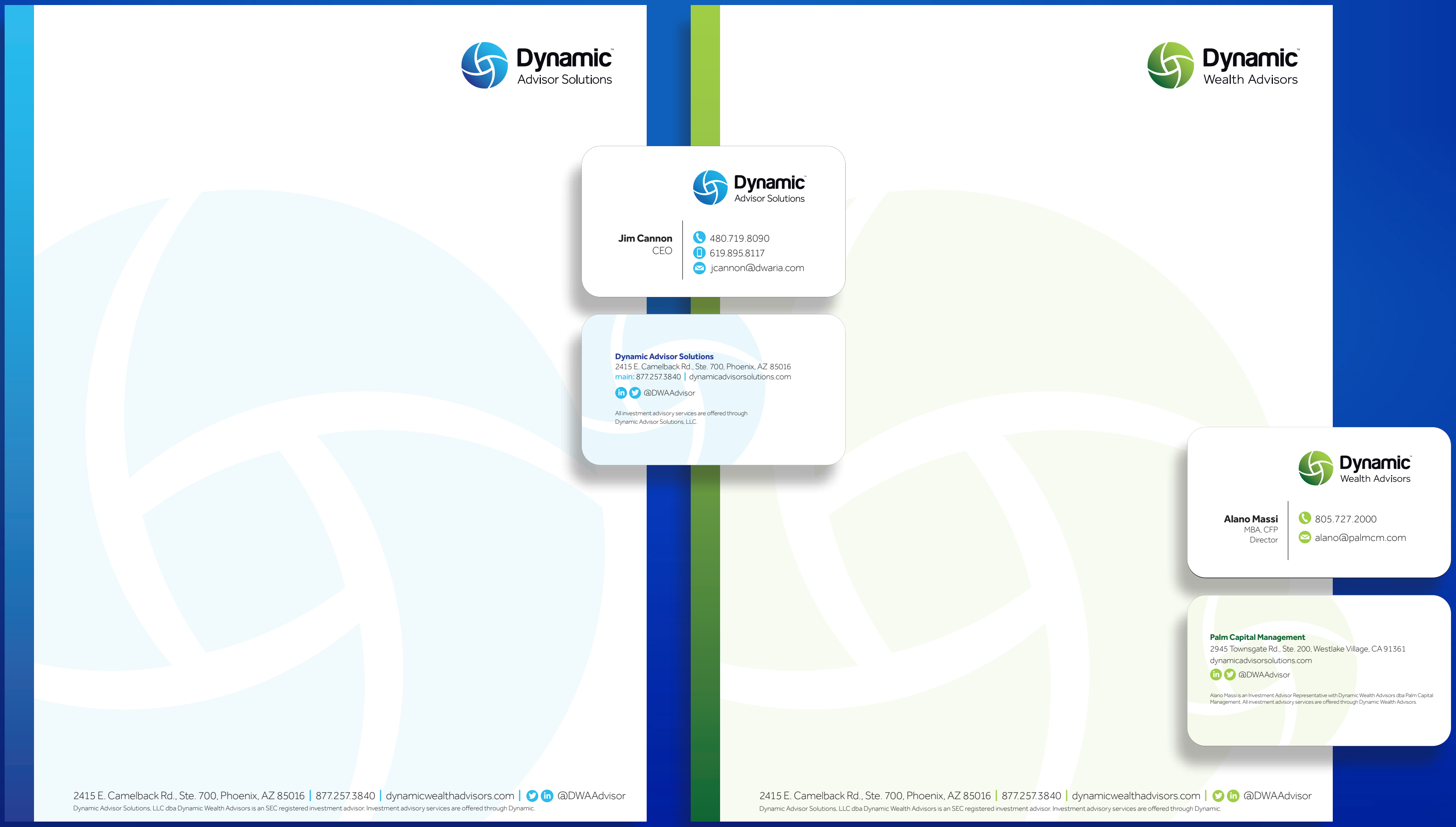
FOR CLIENTS

Dynamic™
Wealth Advisors

RECREATING THE BRAND

BRANDING

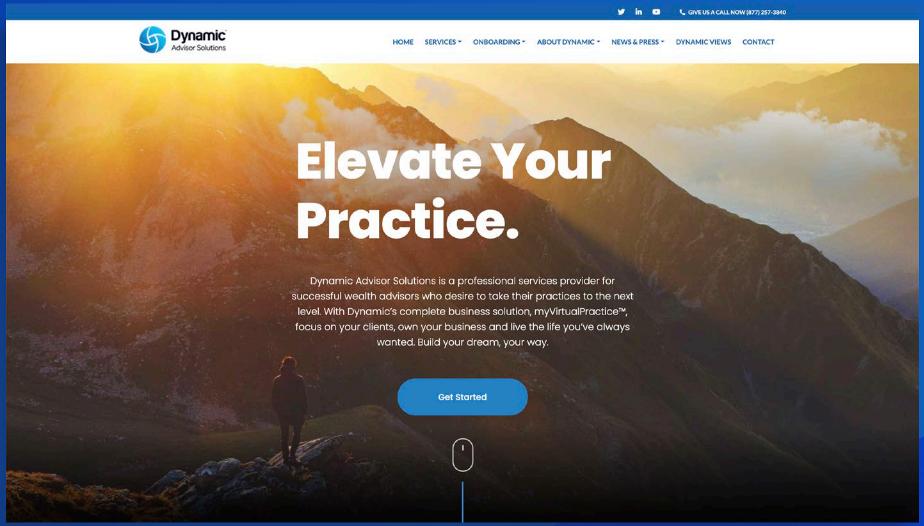
IDENTITY



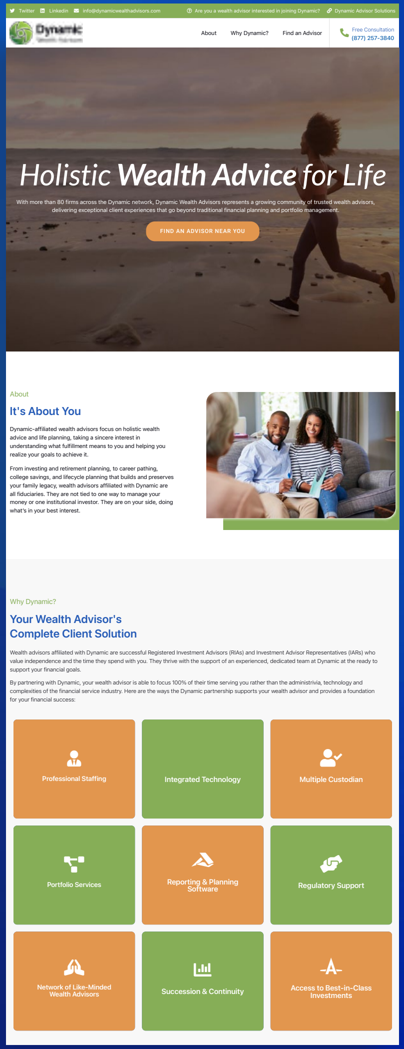
BRANDING

WEBSITES

dynamicadvisorsolutions.com



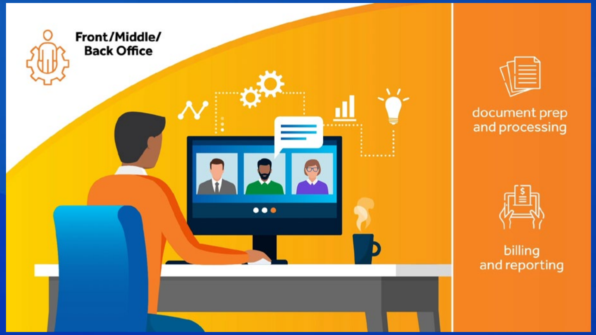
dynamicwealthadvisors.com



BRANDING

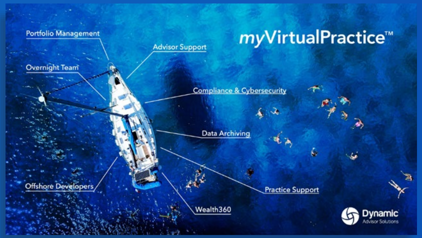
VIDEO

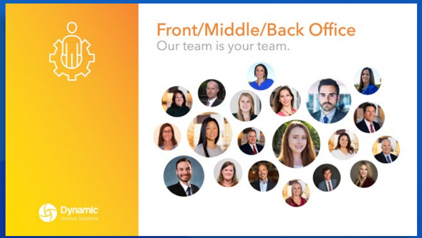
dynamicadvisorsolutions.com/services

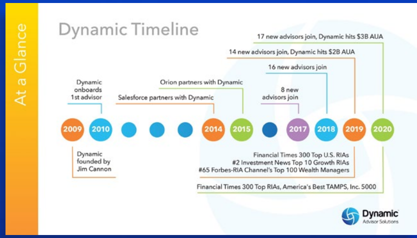


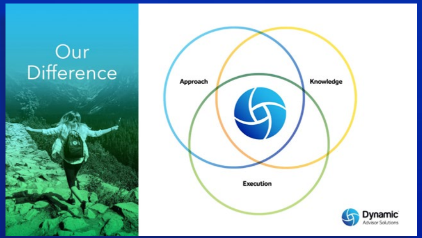
BRANDING

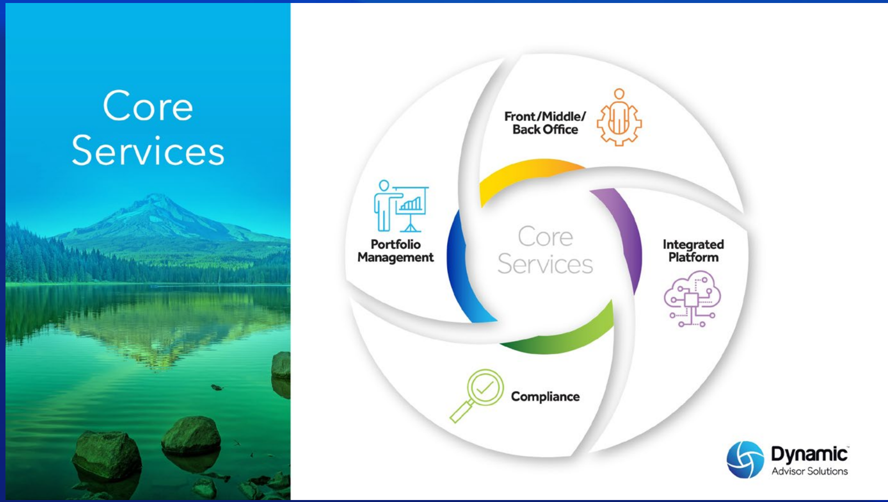
PRESENTATION







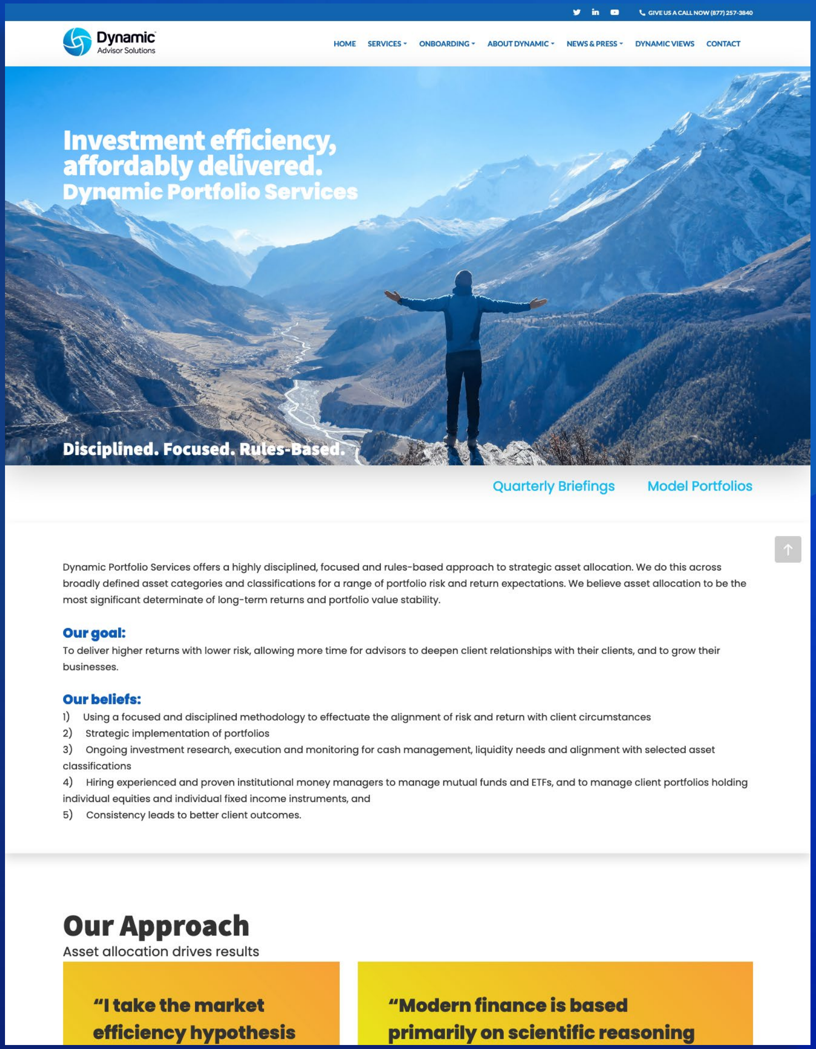


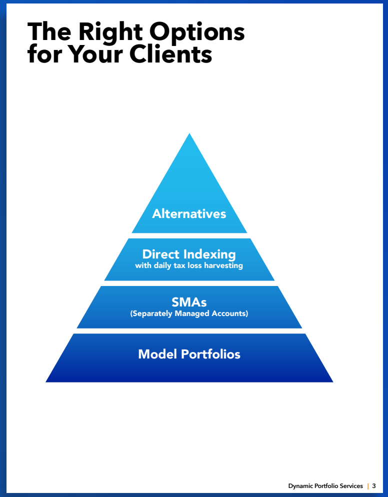


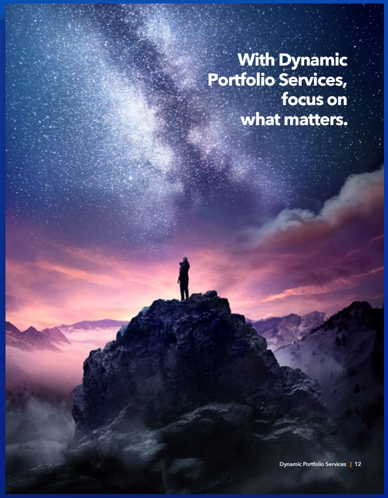
PORTFOLIO SERVICES

BRANDING

dynamicadvisorsolutions.com/portfolio-services



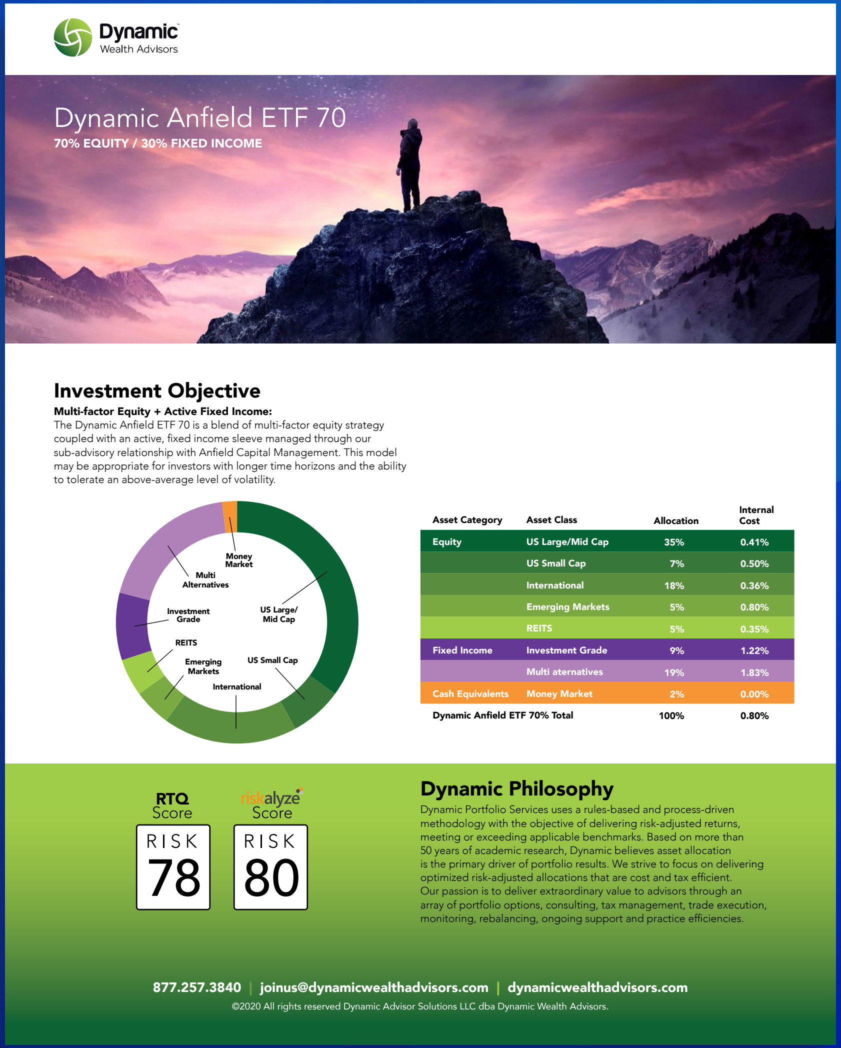




MODEL PORTFOLIOS

BRANDING

dynamicadvisorsolutions.com/portfolio-services



Dynamic Wealth Advisors

Dynamic Anfield ETF 70

70% EQUITY / 30% FIXED INCOME

Investment Objective

Multi-factor Equity + Active Fixed Income:
The Dynamic Anfield ETF 70 is a blend of multi-factor equity strategy coupled with an active, fixed income sleeve managed through our sub-advisory relationship with Anfield Capital Management. This model may be appropriate for investors with longer time horizons and the ability to tolerate an above-average level of volatility.

Asset Category	Asset Class	Allocation	Internal Cost
Equity	US Large/Mid Cap	35%	0.41%
	US Small Cap	7%	0.50%
	International	18%	0.36%
	Emerging Markets	5%	0.80%
	REITS	5%	0.35%
Fixed Income	Investment Grade	9%	1.22%
	Multi alternatives	19%	1.83%
Cash Equivalents	Money Market	2%	0.00%
Dynamic Anfield ETF 70% Total		100%	0.80%

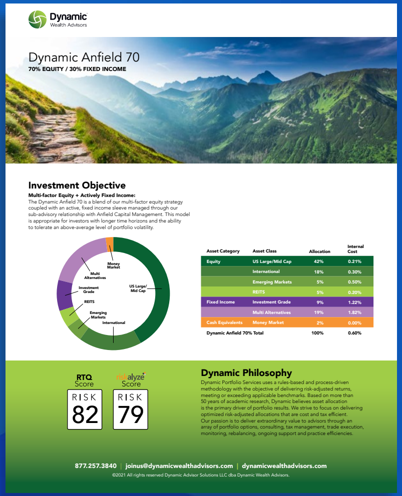
RTQ Score
RISK 78

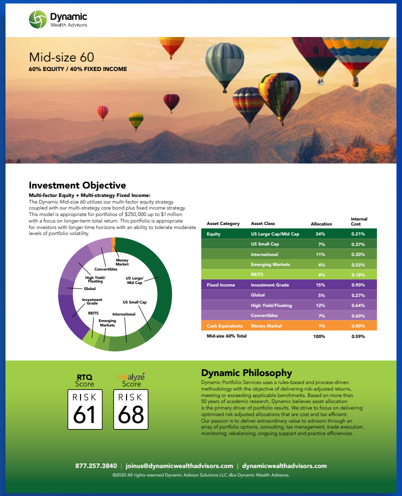
riskalyze Score
RISK 80

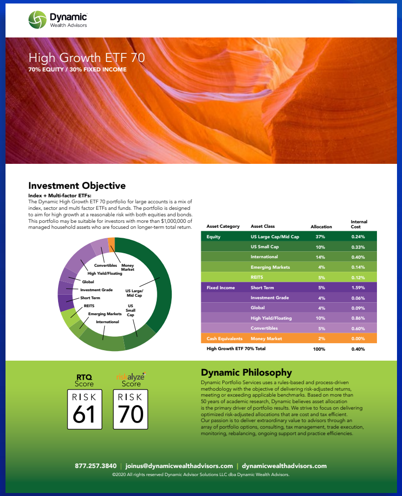
Dynamic Philosophy

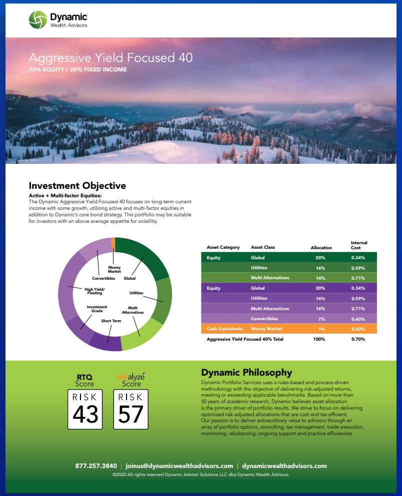
Dynamic Portfolio Services uses a rules-based and process-driven methodology with the objective of delivering risk-adjusted returns, meeting or exceeding applicable benchmarks. Based on more than 50 years of academic research, Dynamic believes asset allocation is the primary driver of portfolio results. We strive to focus on delivering optimized risk-adjusted allocations that are cost and tax efficient. Our passion is to deliver extraordinary value to advisors through an array of portfolio options, consulting, tax management, trade execution, monitoring, rebalancing, ongoing support and practice efficiencies.

877.257.3840 | joinus@dynamicwealthadvisors.com | dynamicwealthadvisors.com





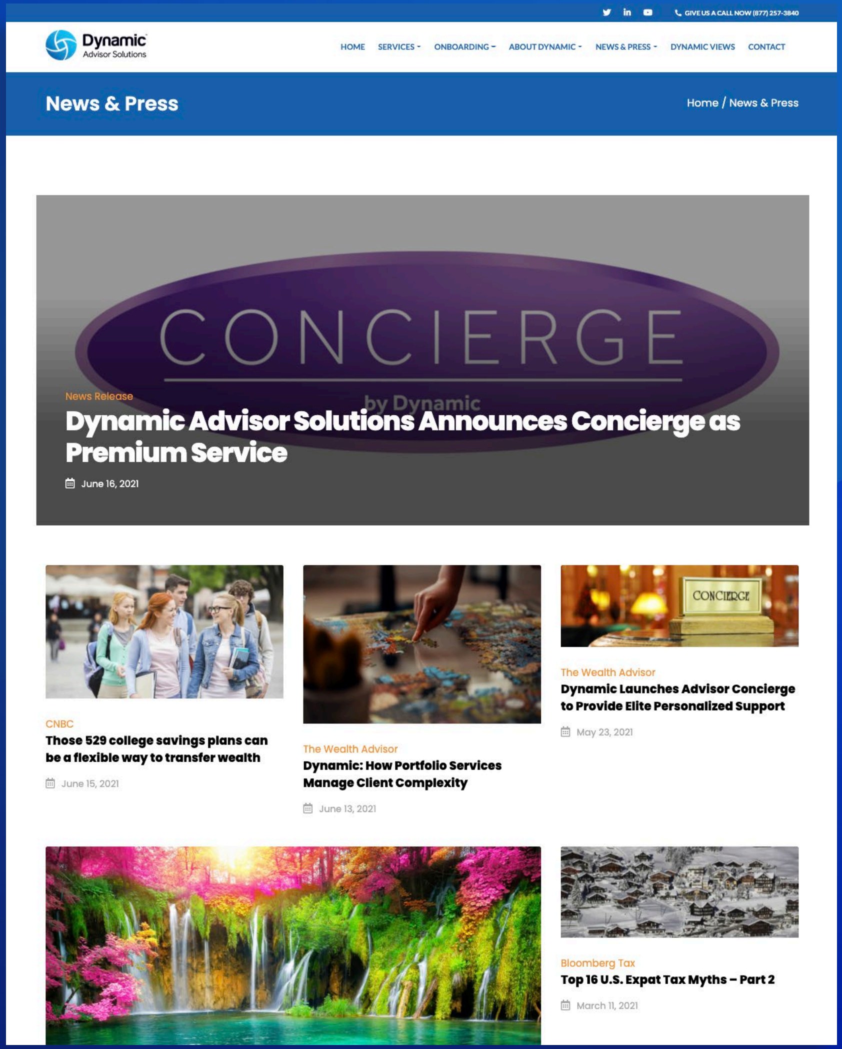


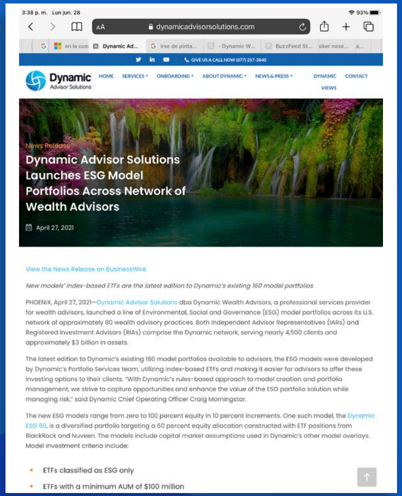


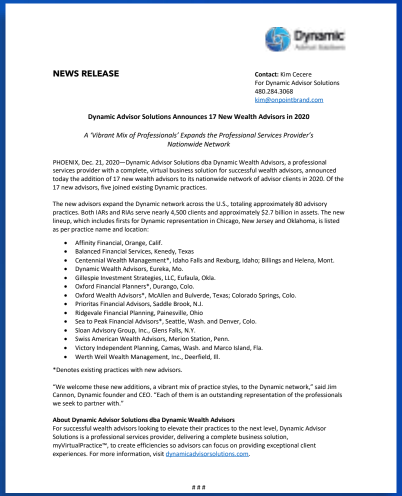
EXTERNAL COMMUNICATIONS

PUBLIC RELATIONS

dynamicadvisorsolutions.com/news-press






Dynamic
Advisor Solutions

NEWS RELEASE

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For Dynamic Advisor Solutions
480.284.3068
kim@onpointbrand.com

Dynamic Advisor Solutions Announces 17 New Wealth Advisors in 2020

A 'Vibrant Mix of Professionals' Expands the Professional Services Provider's Nationwide Network

PHOENIX, Dec. 21, 2020—Dynamic Advisor Solutions dba Dynamic Wealth Advisors, a professional services provider with a complete, virtual business solution for successful wealth advisors, announced today the addition of 17 new wealth advisors to its nationwide network of advisor clients in 2020. Of the 17 new advisors, five joined existing Dynamic practices.

The new advisors expand the Dynamic network across the U.S., totaling approximately 80 advisory practices. Both IARs and RIAs serve nearly 4,500 clients and approximately $2.7 billion in assets. The new lineup, which includes firsts for Dynamic representation in Chicago, New Jersey and Oklahoma, is listed as per practice name and location:

- Affinity Financial, Orange, Calif.
- Balanced Financial Services, Kenedy, Texas
- Centennial Wealth Management*, Idaho Falls and Rexburg, Idaho; Billings and Helena, Mont.
- Dynamic Wealth Advisors, Eureka, Mo.
- Gillespie Investment Strategies, LLC, Eufaula, Okla.
- Oxford Financial Planners*, Durango, Colo.
- Oxford Wealth Advisors*, McAllen and Bulverde, Texas; Colorado Springs, Colo.
- Prioritas Financial Advisors, Saddle Brook, N.J.
- Ridgevale Financial Planning, Painesville, Ohio
- Sea to Peak Financial Advisors*, Seattle, Wash. and Denver, Colo.
- Sloan Advisory Group, Inc., Glens Falls, N.Y.
- Swiss American Wealth Advisors, Merion Station, Penn.
- Victory Independent Planning, Camas, Wash. and Marco Island, Fla.
- Werth Well Wealth Management, Inc., Deerfield, Ill.

*Denotes existing practices with new advisors.

"We welcome these new additions, a vibrant mix of practice styles, to the Dynamic network," said Jim Cannon, Dynamic founder and CEO. "Each of them is an outstanding representation of the professionals we seek to partner with."

About Dynamic Advisor Solutions dba Dynamic Wealth Advisors
For successful wealth advisors looking to elevate their practices to the next level, Dynamic Advisor Solutions is a professional services provider, delivering a complete business solution, myVirtualPractice™, to create efficiencies so advisors can focus on providing exceptional client experiences. For more information, visit dynamicadvisorsolutions.com.

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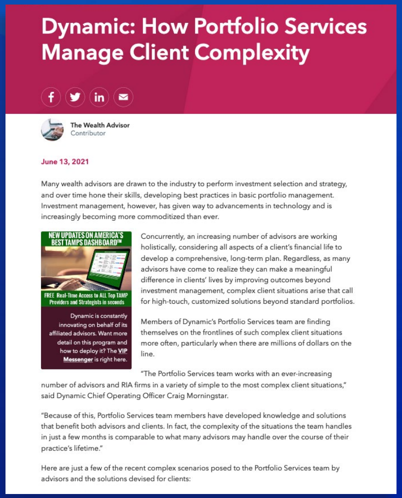
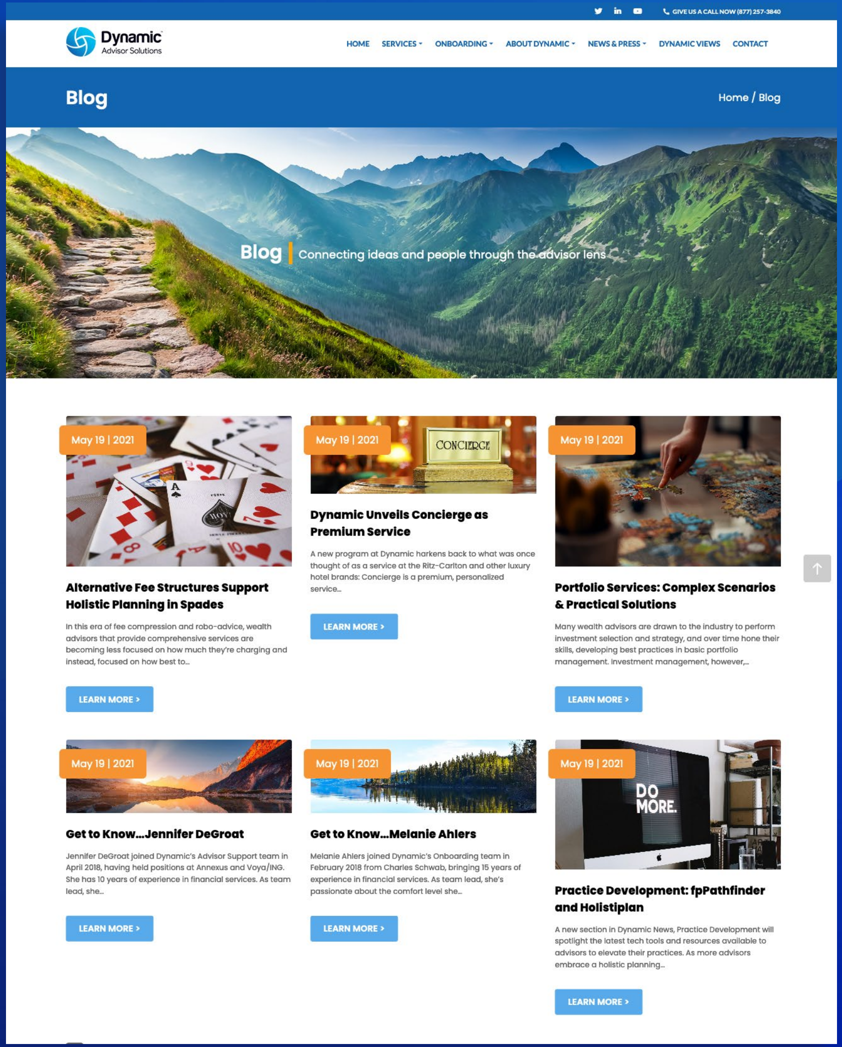
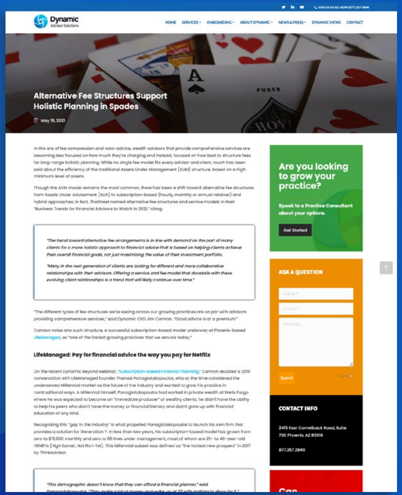


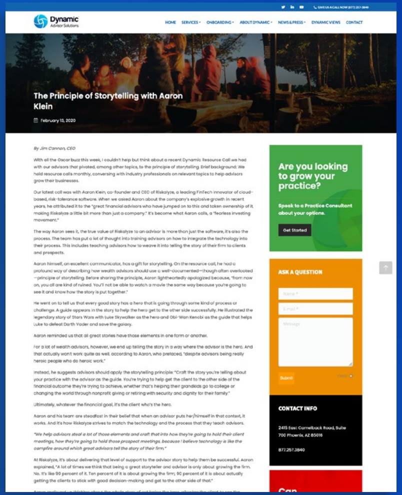
EXTERNAL COMMUNICATIONS

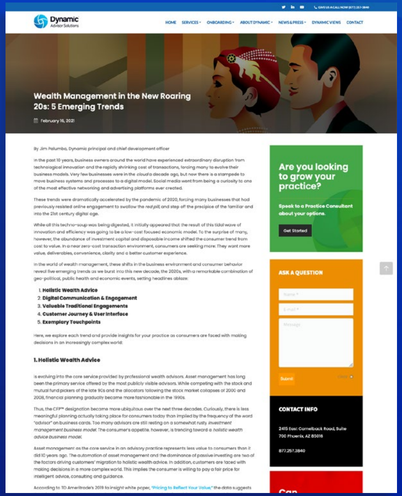
CONTENT STRATEGY

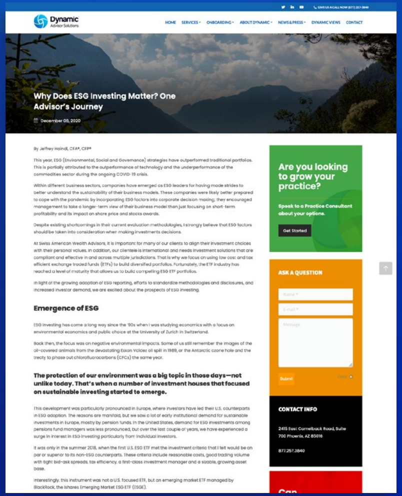
dynamicadvisorsolutions.com/blog





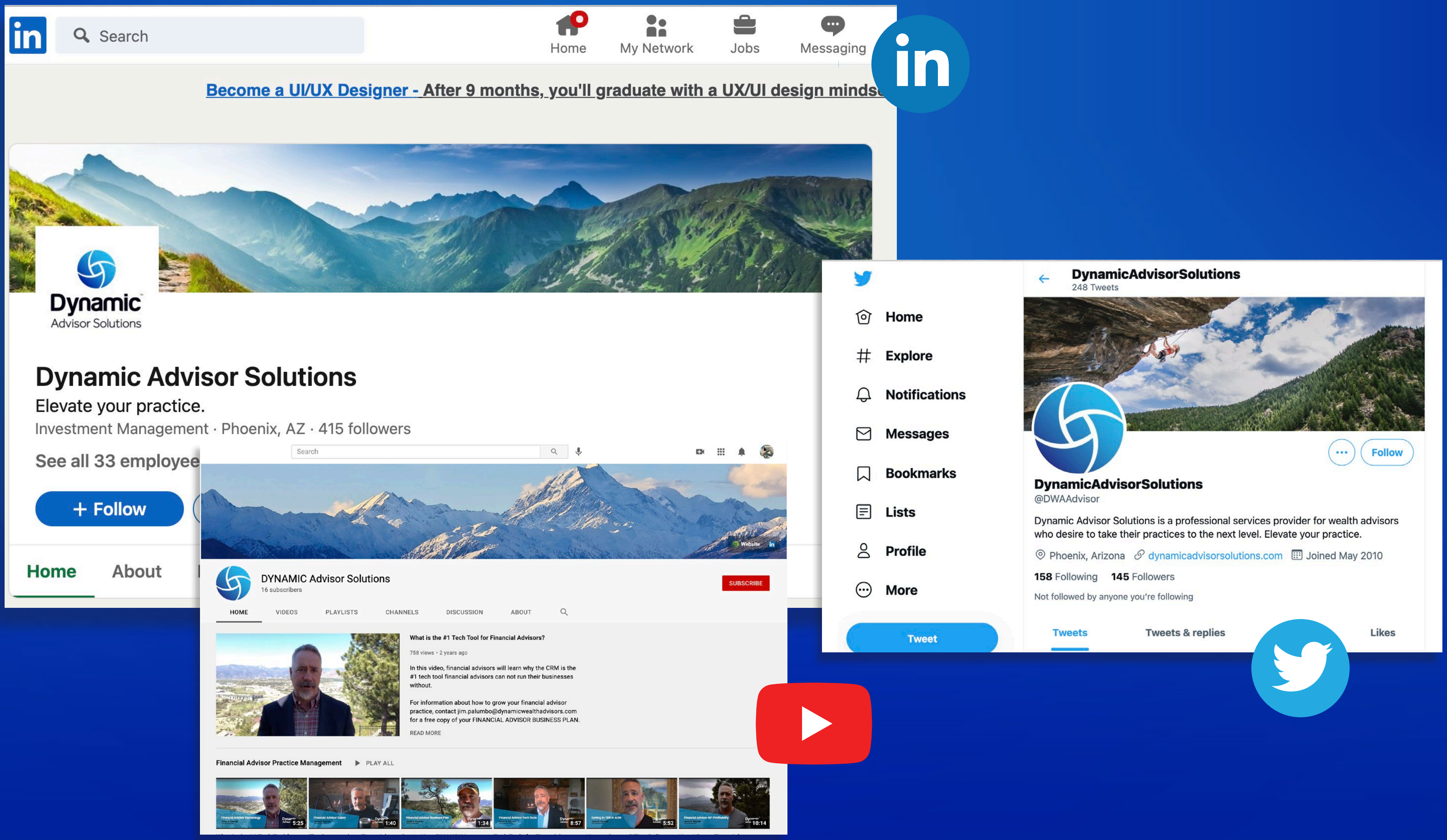






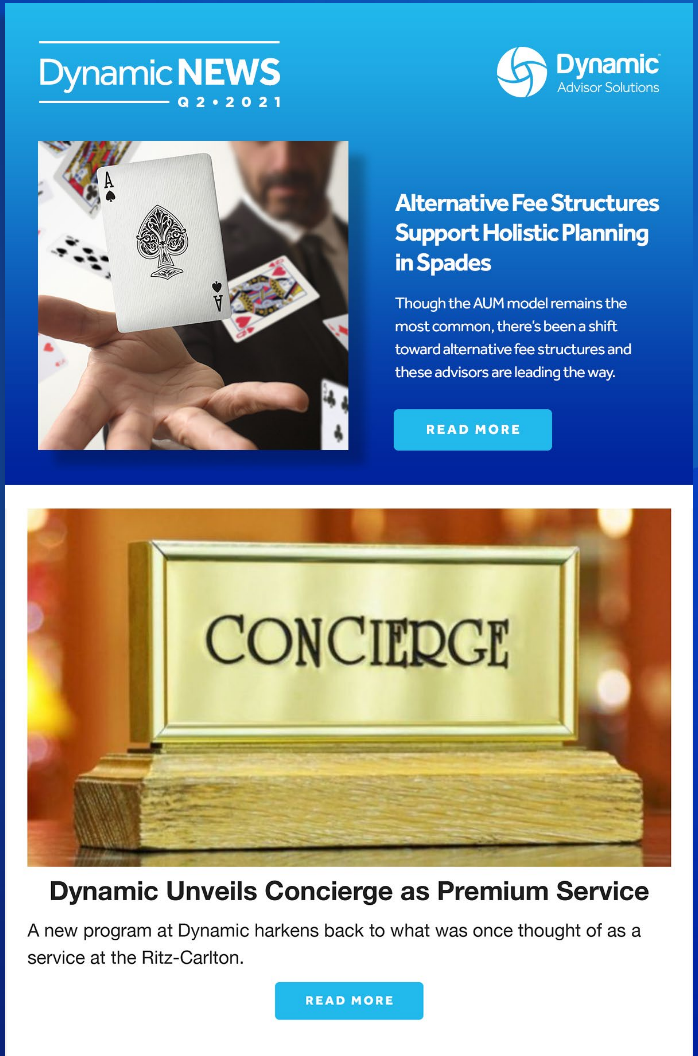
EXTERNAL COMMUNICATIONS

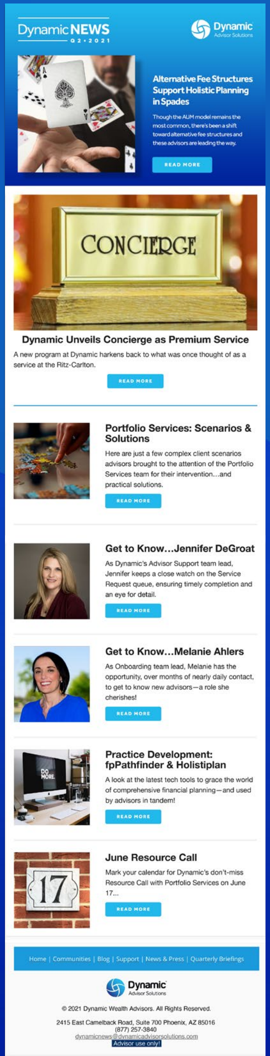
SOCIAL

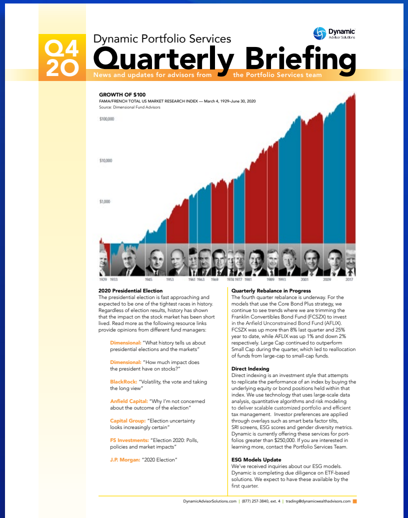


INTERNAL COMMUNICATIONS

NEWSLETTERS







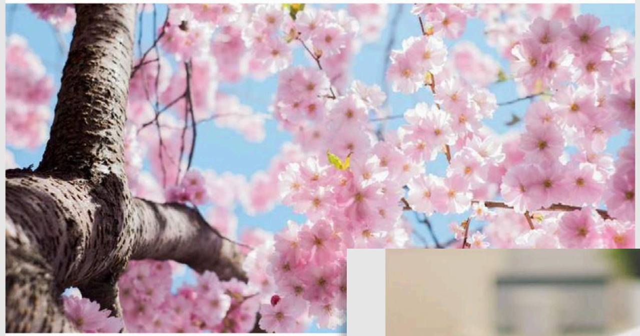
INTERNAL COMMUNICATIONS

EMAIL MARKETING

Keeping Up with Dynamic News…and Dads

This week on BusinessWire, Dynamic officially announced Concierge as a personalized service for wealth advisory practices. Serving the "Concierge desk" is a dedicated Dynamic team with years of industry experience and training on performing client service and managing operational challenges. Concierge professionals also possess deep knowledge of Dynamic's systems and its integrated platform, Wealth360. Read on for more on this enhanced level of administrative services and why Concierge is an alternative solution to hiring personnel or contracting with a virtual assistant.

CNBC featured Client Advisor Philip Herzberg, CFP®, CTFA, AEP®, MSF of The Lubitz Financial Group, Coral Gables, Fla., in FA Playbook's, "Those 529 college



Debunking Tax Myths... And

In a two-part article on Bloomberg Tax, Marina Herr
Wealth Advisors dba Swiss American Wealth Adviso
Americans living abroad. In "Top 16 U.S. Expat Tax M

Creative tax advice from neighbors, friends and stor
Americans living abroad, tax misinformation tends t
where incorrect advice is quick to be shared and ha
of coronavirus. Given the punitive nature of foreign
understanding what is wrong about these myths is

In the Dynamic Newsroom

In case you may have missed these stories, we're sharing our latest news and press from the Dynamic Newsroom. Thank you to our advisor partners for sharing their stories!

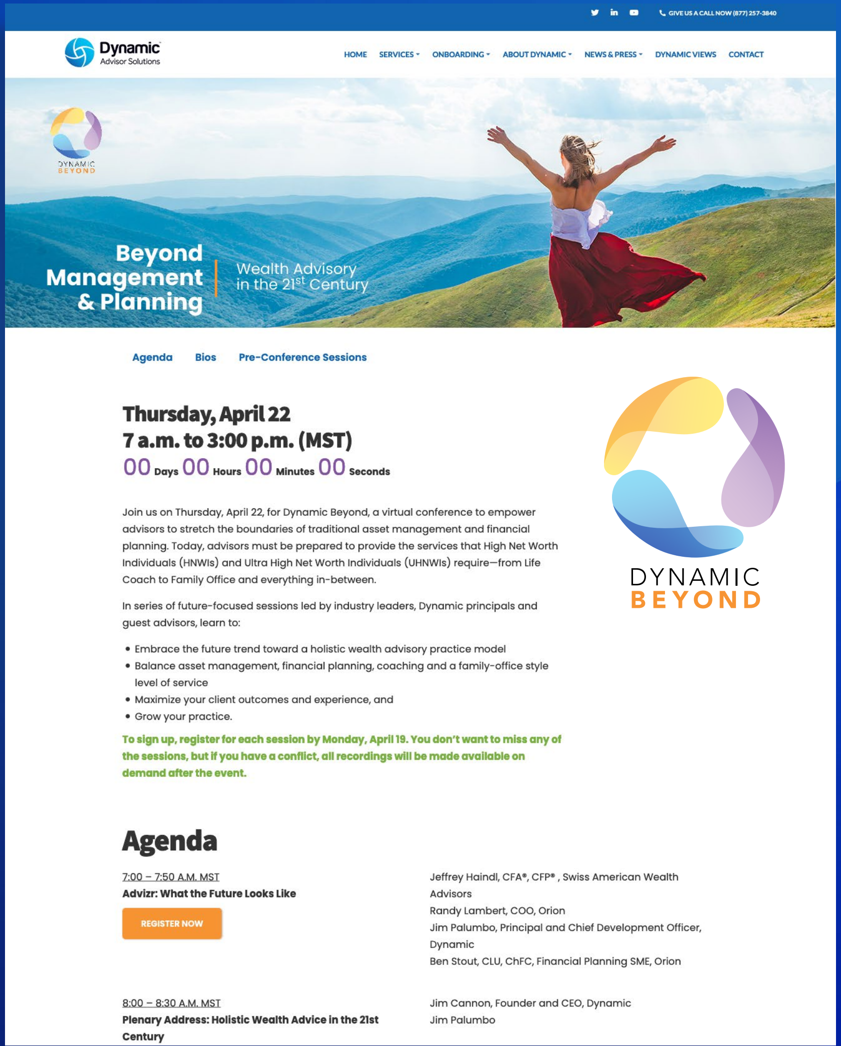
In the March print edition of Financial Advisor Magazine, Tom McCann of Crestview Capital Management in Agoura Hills, Calif., talks about how he uncovered a strategy that saved an attorney client hundreds of thousands of dollars in taxes and helped defer the payment into the client's retirement years. Find out how he solved it, in "Cutting Down a Lawyer's Tax Burden."

This week, The Wealth Advisor ran a recent article that appeared on the Dynamic Views blog, "Dynamic Advisor Solutions Launches ESG Factor Models." To read the original blog post, "Dynamic Announces ESG Models," click here.

Dynamic's listing in The Wealth Advisor's America's Best TAMPs 2021 edition rounds out a list of 30 TAMP

VIRTUAL CONFERENCES & RESOURSE CALLS

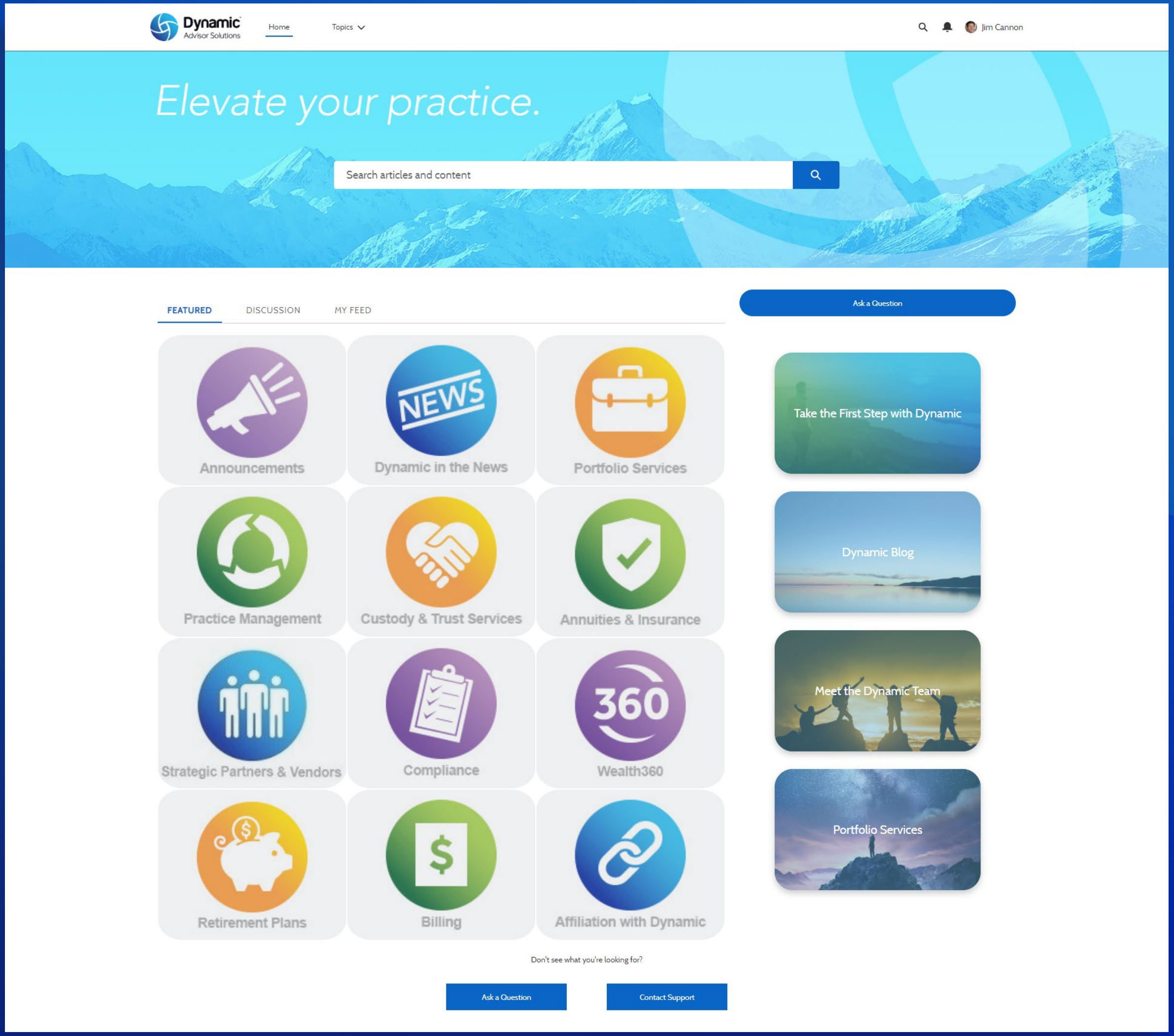
INTERNAL COMMUNICATIONS



ELEVATE2021

INTERNAL COMMUNICATIONS

COMMUNITIES



Dynamic™ Advisor Solutions

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