



BUILDING THE BRAND

Brand positioning, creation & communications (Q4 2019-PRESENT)

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.

TAGLINE:

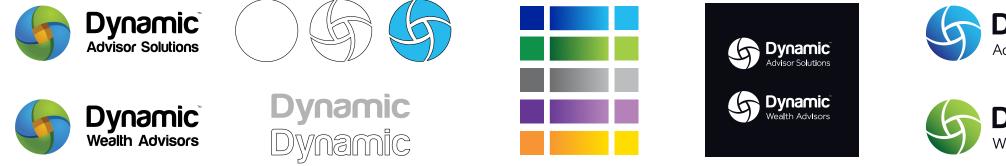
Elevate your practice.

ABOUT DYNAMIC:

Build your dream, your way.

RESOURCES – TECHNOLOGY – EFFICIENCY – PARTNERS 3ASED – KNOWLEDGE – 21ST CENTURY PRACTICE – BEST S – CLOUD-BASED – KNOWLEDGE – 21ST CENTURY PRAC DISCIPLINE – FOCUS – PEOPLE – RESOURCES – TECHNOL IN SUCCESS – CLOUD-BASED – KNOWLEDGE – 21ST C PARTNERS IN SUCCESS – CLOUD-BASED – KNOWLEDGI Dynamic Advisor Solutions is a professional services provider for successful wealth advisors who value independence and desire NERS IN SUCCESS – CLOUD-BASED to take their practices to the next level. With Dynamic's completeor FINTECH - DISCIPLINE - FOCUS business solution, myVirtualPractice,[™] focus on your clients, *IENCY – PARTNERS IN SUCCESS – CLOUD-B* own your business and live the life you've always wanted. TICE - BEST OF FINTECH - DISCIPLINE - FOC ECHNOLOGY – EFFICIENCY – PARTNERS IN SUCCESS 21ST CENTURY PRACTICE – BEST OF FINTECH – D **RESOURCES – TECHNOLOGY – EFFICIENCY – PARTNERS** -BASED – KNOWLEDGE – 21ST CENTURY PRACTICE – BEST

S – CLOUD-BASED – KNOWLEDGE – 21ST CENTURY PRAC







RECREATING THE BRAND

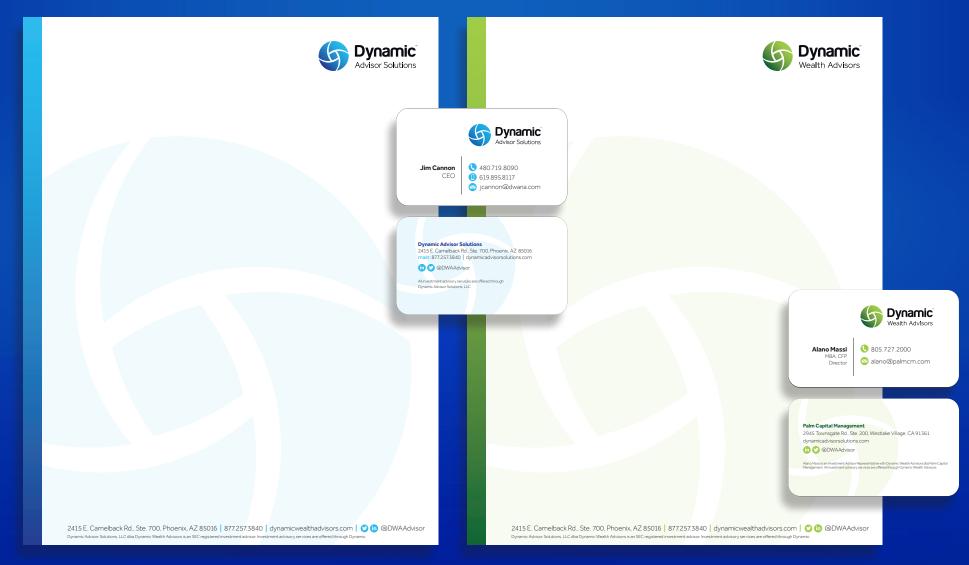
FOR ADVISORS



FOR CLIENTS

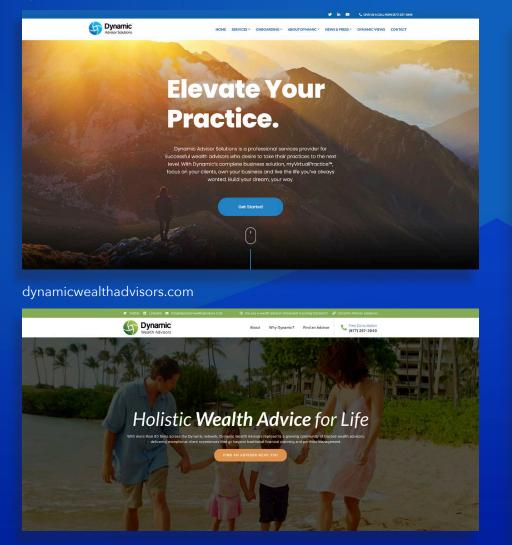


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dynamicadvisorsolutions.com







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Why Dynamic? Your Wealth Advisor's Complete Client Solution

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Build your dream, your way. dynamicadvisorsolutions.com







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myVirtualPractice™

Front/Middle/Back Office

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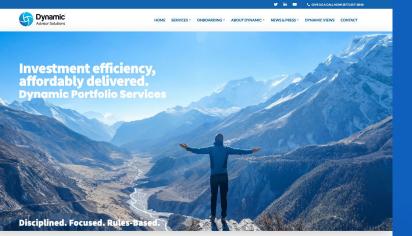
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Dynamic Advisor Solutions

dynamicadvisorsolutions.com/portfolio-services



Quarterly Briefings Model Portfolios

Dynamic Portfolio Services offers a highly disciplined, focused and rules-based approach to strategic asset allocation. We do this across broadly defined asset categories and classifications for a range of portfolio risk and return expectations. We believe asset allocation to be the most significant determinate of long-term returns and portfolio value stability.

Our goal:

To deliver higher returns with lower risk, allowing more time for advisors to deepen client relationships with their clients, and to grow their businesses.

Our beliefs:

- 1) Using a focused and disciplined methodology to effectuate the alignment of risk and return with client circumstances
- 2) Strategic implementation of portfolios
- 3) Ongoing investment research, execution and monitoring for cash management, liquidity needs and alignment with selected asset classifications
- 4) Hiring experienced and proven institutional money managers to manage mutual funds and ETFs, and to manage client portfolios holding individual equities and individual fixed income instruments, and

5) Consistency leads to better client outcomes.

Our Approach

Asset allocation drives results

"I take the market efficiency hypothesis "Modern finance is based primarily on scientific reasoning



Dynamic Portfolios by Design

We understand there are different ways advisors manage investments. Some invest at the account level, others at the household level, account level, acress rays, not he investment selection for a small account inst the same as that of a larger account. Different account types can utilize different investment selections due to tax sensitivity. Our goals to provide a mage of the most common portfolio strategies selected by advisors, different ja range of equity in feed investment locations.



SMAs (teppantaly Managed Account) Model Portfolios

Direct Indexing

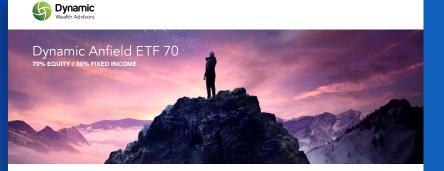
The Right Options for Your Clients

> With Dynamic Portfolio Services, focus on what matters

Dynamic Portfolio Services

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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		
Fixed Income	Investment Grade	9 %	1.22%
	Multi aternatives	19%	1.83%
Dynamic Anfield ETF 70% Total		100%	0.80%



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













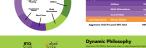
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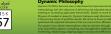














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on to Dynamic's existing 180 model portfolios

s dba Dynamic Wealth Advisors, a professional services provider ntot, Social and Governance (II:S0) model portfolios across its U.S. ctices. Both independent Advisor Representatives (IARs) and the Dynamic network, serving nearly 4,500 cileris and

portfolios available to advisors, the ESO models were developed ar-based ETFs and making it easier for advisors to offer these rubs-based agaroach to model records and portfolio and enhance the value of the ESO portfolio solution while licer Craig Morningstor.

nt equity in 10 percent increments. One such model, the Dynami cent equity allocation constructed with ETF positions from al market assumptions used in Dynamic's other model overlays.



Dynamic For Dynamic Advisor Solution 480.284.3068 kim@orpointbrand.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 walth 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 MRs and RMs steve nearly 4,500 clients and approximately 52.7 billion in assets. The new lineup, which includes firsts for Dynamic representation in Chicago, New Jensey and Oklahoma, is listed as per practice name and location:

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*Denotes existing practices with new advisors.

"We welcome these new additions, a vibrant mix of practice styles, to the Dynamic network," said Jim Canoos, 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 tooling to elevate their practices to the next level, Dynamic Advisor Solutions is a productional services provide, relivening a complete business solution, myVrtuality-retur¹⁴, to create efficiencies so advisors can focus on providing exceptional client experiments. For more information, virial <u>internet of constructions</u> com-

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Contributor

June 13, 2021

Many wealth advisors are drawn to the industry to perform investment selection and strategy. and over time how their skills, developing best practices in basic portfolio management. Investment management, however, has given way to advancements in technology and is increasingly becoming more commoditized than ever.



Members of Dynamic's Portfolio Services team are finding themselves on the frontlines of such complex client situations more often, particularly when there are millions of dollars on the

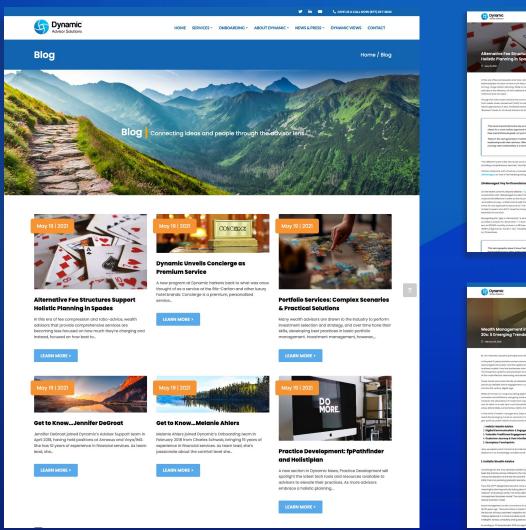
detail on this program and how to deploy it? The <u>VIP</u> <u>Messenger</u> is right here. "The Portfolio Services team works with an ever-ince number of advisors and RIA firms in a variety of simple to the most complex client situations," said Dynamic Chief Operating Officer Craig Morningstar.

"Because of this. Portfolio Services team members have developed knowledge and solutions that benefit both advisors and clients. In fact, the complexity of the situations the team handles in just a few months is comparable to what many advisors may handle over the course of their practice's lifetime."

Here are just a few of the recent complex scenarios posed to the Portfolio Services team by advisors and the solutions devised for clients:

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dynamicadvisorsolutions.com/blog





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"The boot several observative free arrangements is in the adh-similarity of the part of many - clears for a more buildic approach its forencial advices that is based on helping clears and several tests award forencial park, not just maintening the value of their averagement portfolis.	Get Stand
Many in the next generation of clinets are looking for different and more collaborative relationships with their advisors. Othering a service and fee model that downlask with these evolving clinet validationships is a frame that will dially continue over time."	ASK A QUESTION
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norman o histo one wash thruck two is a boot op being being form be not a model underways of the one-is boosed January on the second the forward growing processes that we service today. ¹⁰	Mercage
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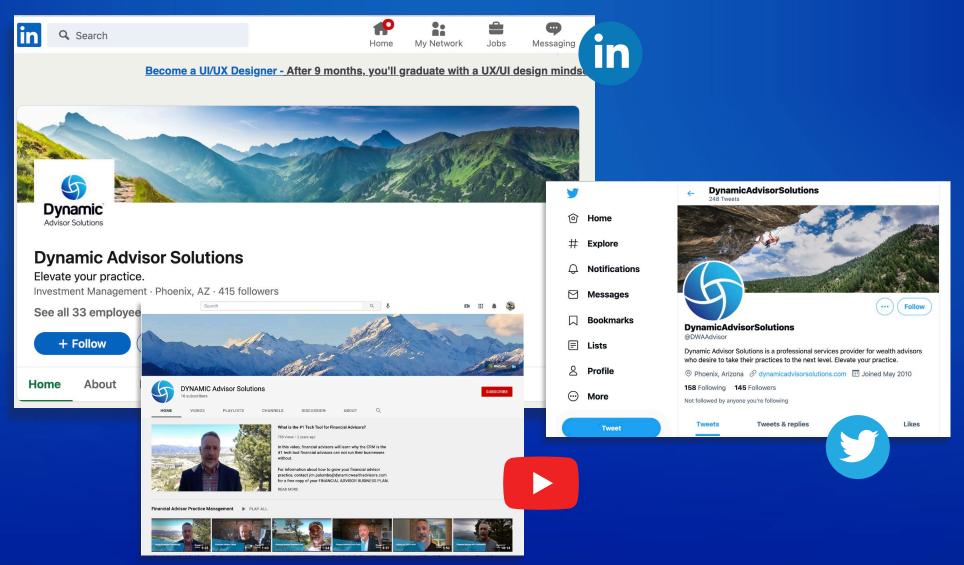
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By Jim Connes, OSD	
With all the Oscier Buck this week, I could'n't help buck thinks about to recent Dynamic treasures Call non-had with our evolvers their pinted, a remarg other topics, to the pinciple of shryteting, their buckground. We had reasone call an orthy, commany and thinks any preference on selecent topics to help advisors growthan businesses.	Are you looking to grow your practice?
Questions call near with hears there, or found are need (500 eR) that you a trading information increasing efficiency increasing engineering and the second se	Speek to a Prostice Consultant about your options
The way Acons see it, the true value of Riskops to an advisor is more than just the software, its also the process. The soon has put a list of thought its training advisors on how to integrate the startwalogy into their process. This includes teaching advisors how to resource it is a setting the story of their firm to clients and prospects.	Get Stoled
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Ne want on is delive that every good skey has a here that is going through some kind of process or challenge. A guide appears in the story to help theleng pet is the other side successfully the Businstell the legendary story of these Name with Lake Revealer as the hero and Obi Wan Renebi as the guide that helps Lake to delete Chath Nade and the guides the guides.	E-mail* Message
Aaron terminded us that all great states have those elements in one form or another.	
For a lot of wealth bd/sors, however, we end up taking the story in a way where the oblean is the hero. And that lots/up won't wair quite less well according to Aboot, who perioded, "despite advases being reality renois people who do herais; wont,"	
Instead: he suggests advisors should apply the storyveling principle "Ensit the story poute selling about your protoce with the advisor on the guide, source syring to help get the client to the other advisor the francial outcome they're trying to advisor, whether that's helping their grandeds go to college or charging the workshough negarity if young or relating with sources/r and adpring for the family."	Mare 1 Contract
utimately, whotever the financial goal, its the client what's the hero.	CONTACT INFO
Acron and his team are standized in their belief that when an advisor puts har/himself in that context, it works. And it's how itsinity a strives to match the technology and the process that they reach advisors.	205 foor Correliant Isoni, Bulle
Ne help cal-locat alocit a lot of those elements and credit that into how traying gaing to hold their client meetings. New they'ng ping to hold those prospect meetings because i believe technology is like the complex conventionity generativities on the story of their first.	200 TOUR COMMON MODEL MODEL SUB- 200 Proveix A2 808/8 8/72/8/13840
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Dynamic **NEWS**



Dynamic Advisor Solutions

Alternative Fee Structures Support Holistic Planning in Spades

Though the AUM model remains the most common, there's been a shift toward alternative fee structures and these advisors are leading the way.

READ MORE



Dynamic Unveils Concierge as Premium Service A new program at Dynamic harkens back to what was once thought of as a service at the Ritz-Carlton.















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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 user 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

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In a two-part article on Bloomberg Tax, Marina Heri Wealth Advisors dba <u>Swiss American Wealth Adviso</u> Americans living abroad. In "Top 16 U.S. Expat Tax N

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 a



In the Dynamic Newsroom

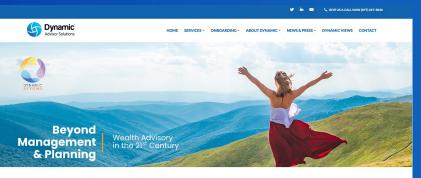
In case you may have missed these stories, we're sharing our latest news and press from the Dynamic Newsroom. Thank you to our advisor partners for sharing their stories!

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 "<u>Dynamic Advisor</u> <u>Solutions Launches ESG Factor Models.</u>" 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

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Thursday, April 22 7 a.m. to 3:00 p.m. (MST) 00 pays 00 Hours 00 Minutes 00 Seconds

Join us on Thursday, April 22, for Dynamic Beyond, a virtual conference to empower advisors to stretch the boundaries of traditional asset management and financial planning. Today, advisors must be prepared to provide the services that High Net Worth Individuals (HNWIs) and Ultra High Net Worth Individuals (UHNWIs) require—from Life Coach to Family Office and everything in-between.

In series of future-focused sessions led by industry leaders, Dynamic principals and guest advisors, learn to:

Embrace the future trend toward a holistic wealth advisory practice model
 Balance asset management, financial planning, coaching and a family-office style
level of service

Maximize your client outcomes and experience, and
 Grow your practice.

To sign up, register for each session by Monday, April 19. You don't want to miss any of the sessions, but if you have a conflict, all recordings will be made available on demand after the event.

Agenda

7:00 – 7:50 A.M. MST Advizr: What the Future Looks Like

TR NOW

8:00 – 8:30 A.M. MST Plenary Address: Holistic Wealth Advice in the 21st Century



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Resilience During Uncertain Times Elevates Values-Based Factors

Dynamic

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A roundtable discussion on the types of values-based investing and the impact of COVID-19 on VBI decisions and strategies







Ben Stout, CLU, ChFC, Financial Planning SME, Orion

Jim Cannon, Founder and CEO, Dynamic 21st Jim Palumbo

Advisors

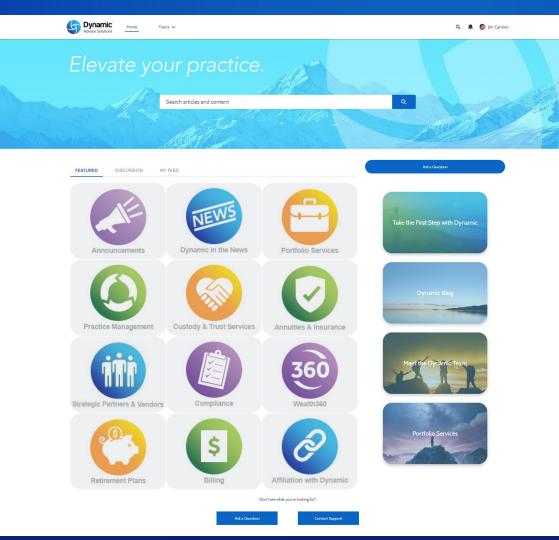
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Randy Lambert, COO, Orion

Jeffrey Haindl, CFA*, CFP* , Swiss American Wealth

Jim Palumbo, Principal and Chief Development Officer,

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