



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.

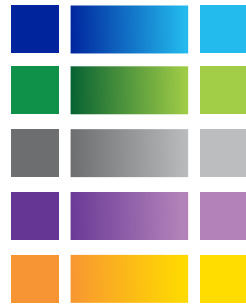
BRAND POSITIONING

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
Dynamic



RECREATING THE BRAND

FOR ADVISORS



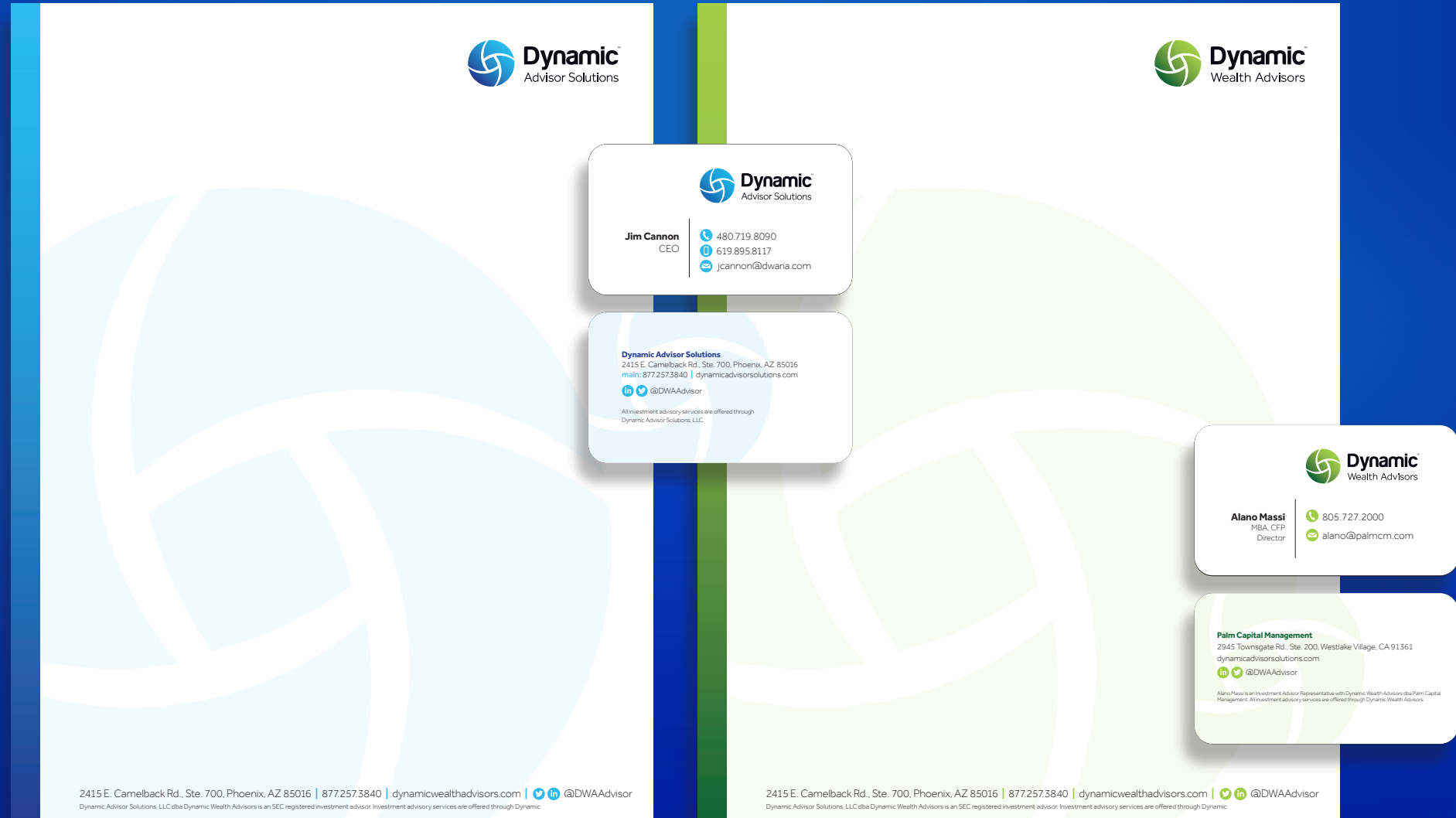
FOR CLIENTS



RECREATING THE BRAND

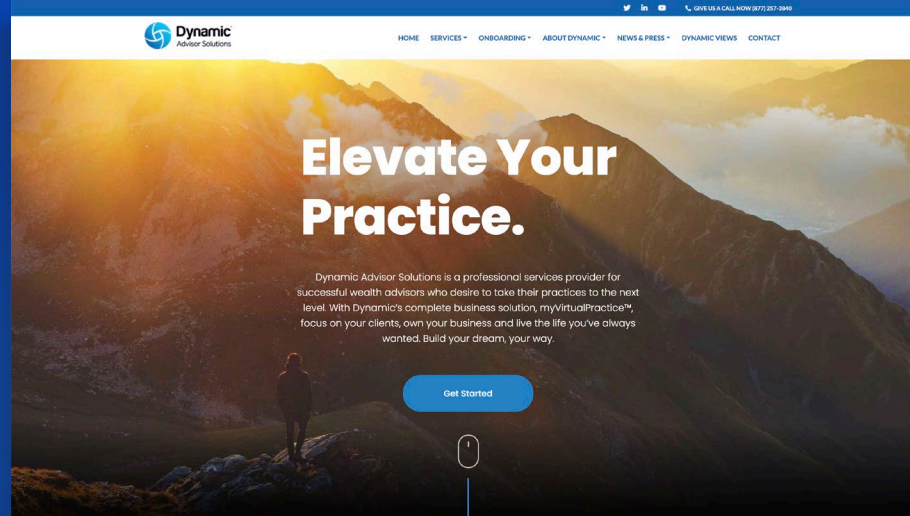
IDENTITY

BRANDING



WEBSITES

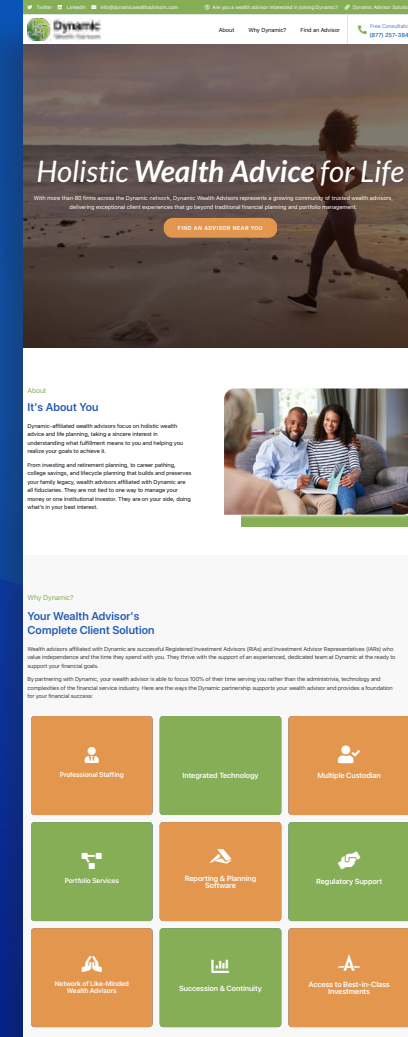
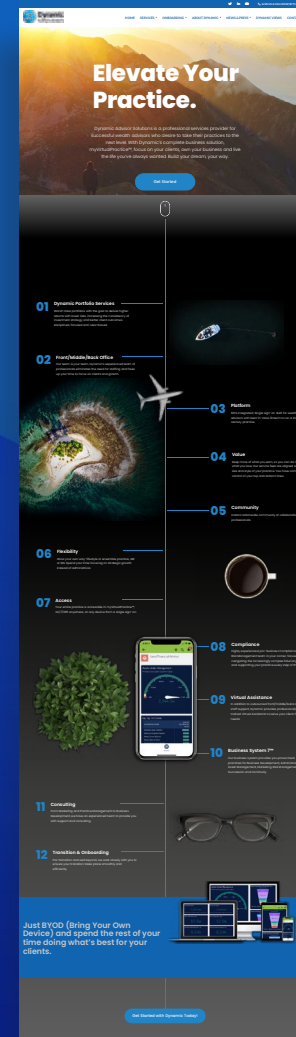
dynamicadvisorsolutions.com



dynamicwealthadvisors.com



BRANDING



VIDEO

dynamicadvisorsolutions.com/services



DynamicTM
Advisor Solutions

Build your dream, your way.
dynamicadvisorsolutions.com



BRANDING

planning
portfolios
customer relationship management
email
client portals
and more

Wealth360 3.0

Integrated Platform



Front/Middle/Back Office

document prep and processing
billing and reporting



Form ADV Updates
Client Contract Maintenance
Books and Records Requirements

REGULATORY REQUIREMENTS

1. [checkmark]
2. [checkmark]
3. [checkmark]

Compliance



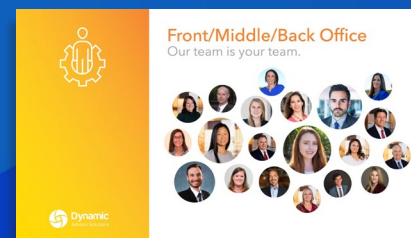
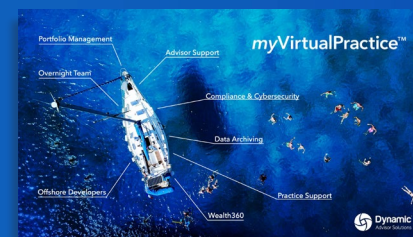
PRESENTATION

BRANDING



The Dynamic Experience
Elevate your practice.

Dynamic
Advisor Solutions



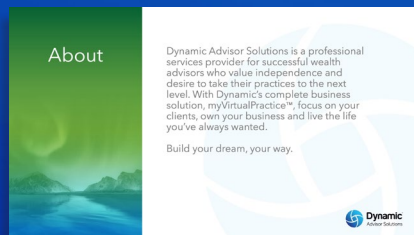
Front/Middle/Back Office
Our team is your team.

Diagram illustrating the team structure, showing a central group of team members surrounded by icons representing different roles or departments.



What's your vision for your practice?

Dynamic Advisor Solutions

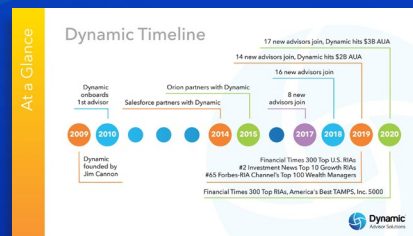


About

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.

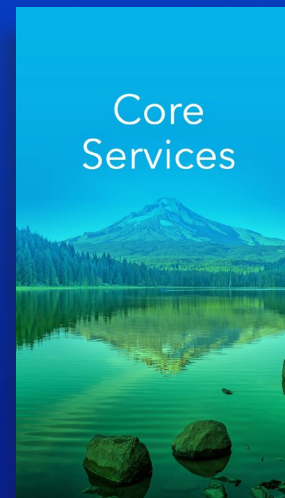
Build your dream, your way.

Dynamic
Advisor Solutions



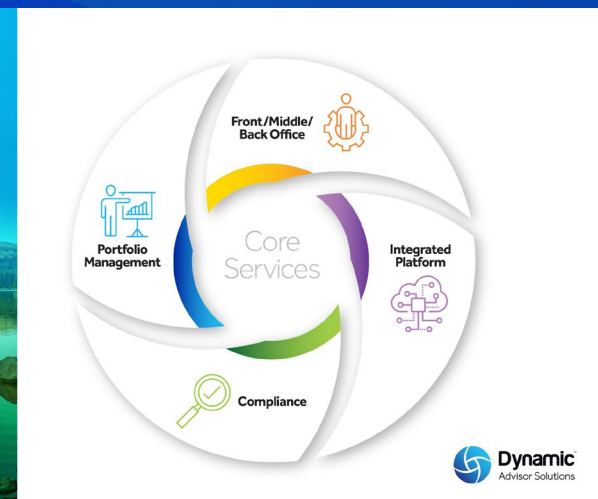
Dynamic Network

Map of the United States showing the locations of Dynamic Advisor Solutions offices across various states.



Core Services

Diagram illustrating the company's core services, showing a central circle labeled "Core Services" surrounded by four overlapping circles labeled "Front/Middle/Back Office", "Portfolio Management", "Integrated Platform", and "Compliance".



PORTFOLIO SERVICES

dynamicadvisorsolutions.com/portfolio-services

The screenshot shows the homepage of the Dynamic Portfolio Services website. At the top, there is a navigation bar with the Dynamic Advisor Solutions logo and links for HOME, SERVICES, ONBOARDING, ABOUT DYNAMIC, NEWS & PRESS, DYNAMIC VIEWS, and CONTACT. The main header features a large image of a person standing on a mountain peak with arms outstretched, overlooking a valley. The text reads: "Investment efficiency, affordably delivered. Dynamic Portfolio Services". Below this, it says "Disciplined. Focused. Rules-Based." and lists "Quarterly Briefings" and "Model Portfolios". The main content area starts with a paragraph about their disciplined approach to strategic asset allocation. It then lists their goals and beliefs. The "Our Approach" section highlights that asset allocation drives results and includes two quotes: "I take the market efficiency hypothesis" and "Modern finance is based primarily on scientific reasoning".

Dynamic Advisor Solutions

HOME SERVICES ONBOARDING ABOUT DYNAMIC NEWS & PRESS DYNAMIC VIEWS CONTACT

Investment efficiency, affordably delivered.
Dynamic Portfolio Services

Disciplined. Focused. Rules-Based.

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.

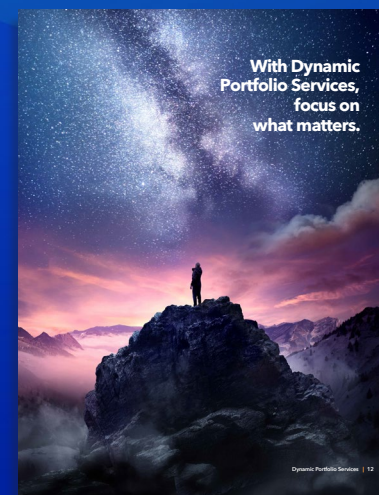
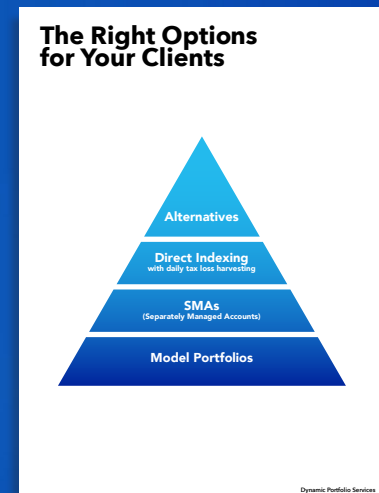
Our beliefs:

- 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"



MODEL PORTFOLIOS

dynamicadvisorsolutions.com/portfolio-services



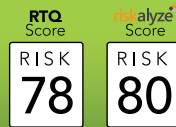
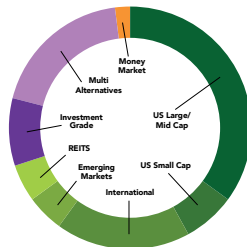
Dynamic Anfield ETF 70

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.



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

©2020 All rights reserved Dynamic Advisor Solutions LLC dba Dynamic Wealth Advisors.

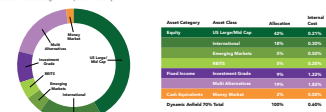


Dynamic Anfield 70

70% EQUITY / 30% FIXED INCOME

Investment Objective

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



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

©2020 All rights reserved Dynamic Advisor Solutions LLC dba Dynamic Wealth Advisors.



High Growth ETF 70

70% EQUITY / 30% FIXED INCOME

Investment Objective

Index + Multi-Factor ETFs:
The Dynamic High Growth ETF 70 portfolio for large accounts is a mix of index, active and multi-factor ETFs and funds. The portfolio is designed to seek high growth at a reasonable cost with both equity and fixed income components. This portfolio may be suitable for investors with more than \$1,000,000 of managed financial assets who are focused on long-term total return.



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

©2020 All rights reserved Dynamic Advisor Solutions LLC dba Dynamic Wealth Advisors.



Mid-size 60

60% EQUITY / 40% FIXED INCOME

Investment Objective

Multi-Factor Equity + Multi-Factor Fixed Income:
The Dynamic Mid-size 60 utilizes our multi-factor equity strategy coupled with our multi-strategy, core bond and fixed income strategy. This model is appropriate for portfolios of \$250,000 to \$1 million with a focus on long-term total return. The portfolio is appropriate for investors with longer time horizons and the ability to tolerate levels of portfolio volatility.



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

©2020 All rights reserved Dynamic Advisor Solutions LLC dba Dynamic Wealth Advisors.



Aggressive Yield Focused 40

40% EQUITY / 60% FIXED INCOME

Investment Objective

Active + Multi-Factor Equities:
The Dynamic Aggressive Yield Focused 40 focuses on long-term current income with some growth, adding active and multi-factor equities in addition to Dynamic's core bond strategy. This portfolio may be suitable for investors with an above average appetite for volatility.



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

©2020 All rights reserved Dynamic Advisor Solutions LLC dba Dynamic Wealth Advisors.

BRANDING

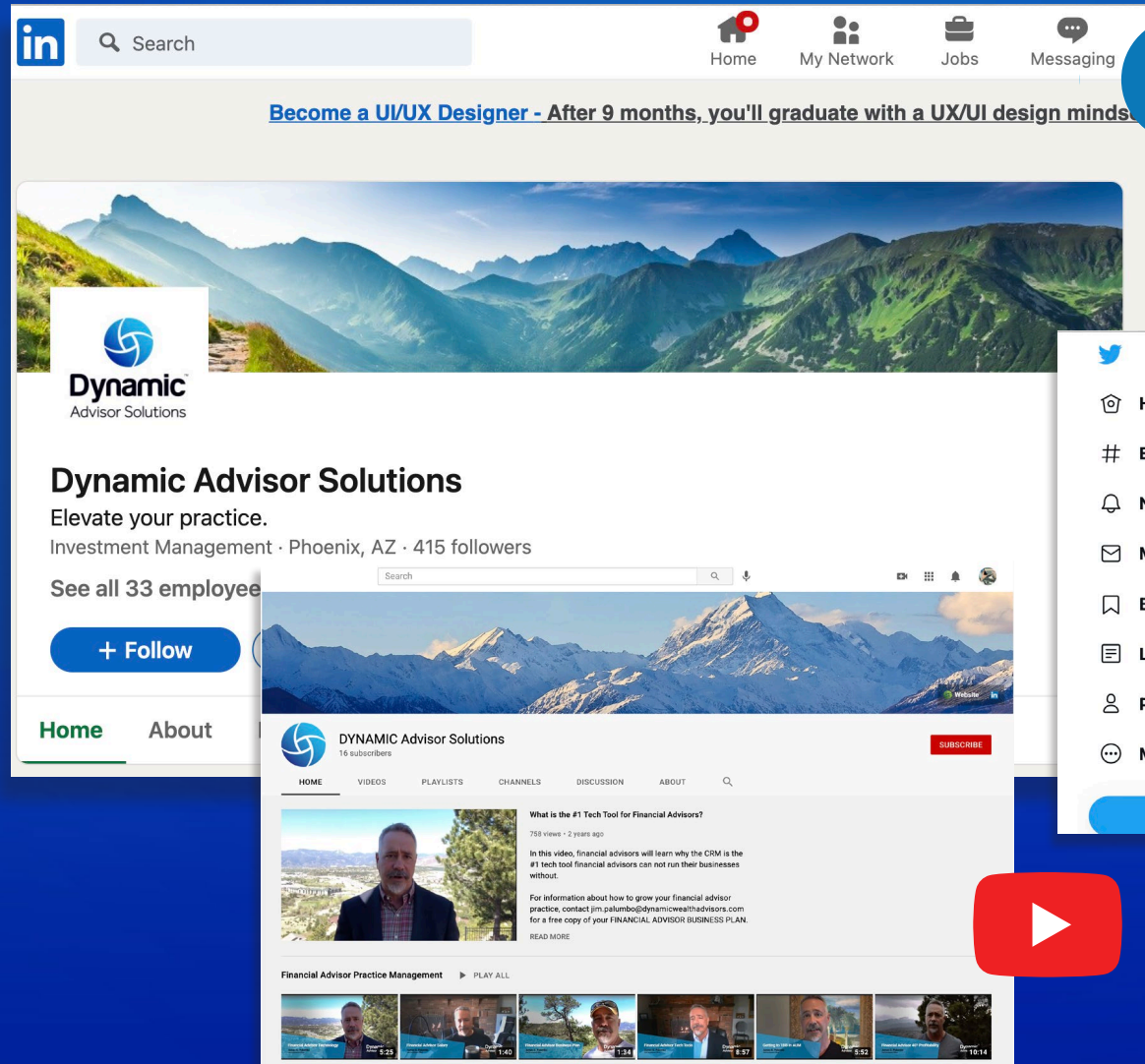
1

1

1

SOCIAL

EXTERNAL COMMUNICATIONS








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.

[READ MORE](#)






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.


[READ MORE](#)



Portfolio Services: Scenarios & Solutions

Here are just a few complex client scenarios advisors brought to the attention of the Portfolio Services team for their intervention...and practical solutions.


[READ MORE](#)



Get to Know...Jennifer DeGroat

As Dynamic's Advisor Support team lead, Jennifer keeps a close watch on the Service Request queue, ensuring timely completion and an eye for detail.


[READ MORE](#)



Get to Know...Melanie Ahlers

As Onboarding team lead, Melanie has the opportunity, over months of nearly daily contact, to get to know new advisors—a role she cherishes!


[READ MORE](#)



Practice Development: fPathfinder & Holistiplan

A look at the latest tech tools to grace the world of comprehensive financial planning—and used by advisors in tandem!


[READ MORE](#)



June Resource Call

Mark your calendar for Dynamic's don't-miss Resource Call with Portfolio Services on June 17...

[READ MORE](#)



© 2021 Dynamic Wealth Advisors. All Rights Reserved.
2415 East Camelback Road, Suite 700 Phoenix, AZ 85016
(877) 257-3840
dynamicwealthadvisors.com
advisors@dynamicwealthadvisors.com



Quarterly Briefing




Trends and Traction in Wealth Management

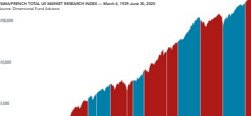
The return of value investing
With the launch of Dynamic's Value Investing Index in 2019, we are seeing a lot of traction in these low-cost, mostly transaction-free solutions. One year of new asset growth in our Value Index fund, and one of the most frequently asked questions: "What is a value investor?" The answer: "A value investor is one who is focused on the long-term growth of a company, rather than short-term price movements." The answer: "A value investor is one who is focused on the long-term growth of a company, rather than short-term price movements."

Dynamic's Defensive models attract assets
With the launch of Dynamic's Defensive Index in 2019, we are seeing a lot of traction in these low-cost, mostly transaction-free solutions. One year of new asset growth in our Value Index fund, and one of the most frequently asked questions: "What is a value investor?" The answer: "A value investor is one who is focused on the long-term growth of a company, rather than short-term price movements." The answer: "A value investor is one who is focused on the long-term growth of a company, rather than short-term price movements."

Dynamic's Portfolio Services experience significant growth year over year
The Portfolio Services team has experienced significant growth year over year, with a 12% increase in assets under management. This growth is driven by a combination of factors, including a strong focus on client education, a commitment to transparency, and a dedication to providing the highest quality of service. The team's success is a testament to the power of a well-defined strategy and a commitment to excellence.



Quarterly Briefing




Quarterly Release Complete


The third quarter release has been completed and is now available. The third quarter release is a comprehensive overview of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite. The release also includes a detailed analysis of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite.

Value Investing Proven a Reliable Way
The third quarter release has been completed and is now available. The third quarter release is a comprehensive overview of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite. The release also includes a detailed analysis of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite.

Dynamic's Portfolio Services experience significant growth year over year
The Portfolio Services team has experienced significant growth year over year, with a 12% increase in assets under management. This growth is driven by a combination of factors, including a strong focus on client education, a commitment to transparency, and a dedication to providing the highest quality of service. The team's success is a testament to the power of a well-defined strategy and a commitment to excellence.



Quarterly Briefing



Looking for Growth in a New Environment

Dynamic's ESG Models Available
The ESG models are now available. The ESG models are a comprehensive overview of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite. The release also includes a detailed analysis of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite.

Value Investing Proven a Reliable Way
The third quarter release has been completed and is now available. The third quarter release is a comprehensive overview of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite. The release also includes a detailed analysis of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite.

Dynamic's Portfolio Services experience significant growth year over year
The Portfolio Services team has experienced significant growth year over year, with a 12% increase in assets under management. This growth is driven by a combination of factors, including a strong focus on client education, a commitment to transparency, and a dedication to providing the highest quality of service. The team's success is a testament to the power of a well-defined strategy and a commitment to excellence.



Quarterly Briefing



Quarterly Release Complete

The third quarter release has been completed and is now available. The third quarter release is a comprehensive overview of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite. The release also includes a detailed analysis of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite.

Value Investing Proven a Reliable Way
The third quarter release has been completed and is now available. The third quarter release is a comprehensive overview of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite. The release also includes a detailed analysis of the market's performance, including a detailed analysis of the S&P 500, the Russell 2000, and the Nasdaq Composite.

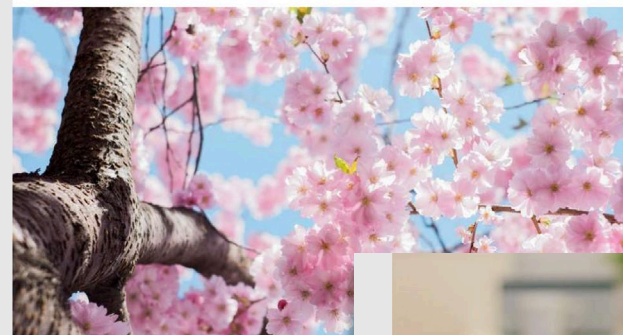
Dynamic's Portfolio Services experience significant growth year over year
The Portfolio Services team has experienced significant growth year over year, with a 12% increase in assets under management. This growth is driven by a combination of factors, including a strong focus on client education, a commitment to transparency, and a dedication to providing the highest quality of service. The team's success is a testament to the power of a well-defined strategy and a commitment to excellence.



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 Herron, a Wealth Advisor at [Swiss American Wealth Advisors](#), discusses tax myths for Americans living abroad. In "Top 16 U.S. Expat Tax Myths," she

provides creative tax advice from neighbors, friends and stories from other Americans living abroad, tax misinformation tends to spread where incorrect advice is quick to be shared and hard to correct. Given the punitive nature of foreign tax authorities, 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 & RESOURCE CALLS


[HOME](#) [SERVICES](#) [ONBOARDING](#) [ABOUT DYNAMIC](#) [NEWS & PRESS](#) [DYNAMIC VIEWS](#) [CONTACT](#)

Beyond Management & Planning
Wealth Advisory in the 21st Century

[Agenda](#) [Bios](#) [Pre-Conference Sessions](#)


Thursday, April 22
7 a.m. to 3:00 p.m. (MST)
 00 Days 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
[REGISTER NOW](#)

Jeffrey Haindl, CFA®, CFP®, Swiss American Wealth Advisors
 Randy Lambert, COO, Orion
 Jim Palumbo, Principal and Chief Development Officer, Dynamic
 Ben Stout, CLU, ChFC, Financial Planning SME, Orion

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

Jim Cannon, Founder and CEO, Dynamic
 Jim Palumbo

INTERNAL COMMUNICATIONS

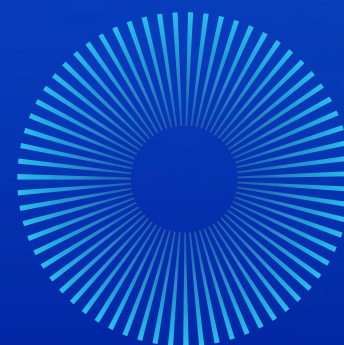
RESOURCE CALL APRIL 2020





Resilience During Uncertain Times Elevates Values-Based Factors

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



ELEVATE2021

RESOURCE CALL OCTOBER 22TH 2020





Is It Different This Time?

A Round-Table Discussion of Market Trends in 2020

Apolita Lupescu - Dimensional Fund Advisors

GUESTS



Sean Edkins
 CIMA Director, Head of ETF Sales & Strategic Partnership, DWS - Scottsdale, AZ
 Sean joined DWS in 2013 with 20 years of industry experience. Prior to his current role, Sean was an ETF Investment Consultant in the Global Client Group. He served as a Director in Alternative Investment Consulting at PIMCO. Prior to that, he was a regional Sales Consultant for HSBC, BNA, Family Offices, Foundations and Endowments at State Street Global Advisors.

Sean was a member of the original iShares launch team at Barclays Global Investors and held various positions at Merrill Lynch, Prudential Investments, Pimco Group, Dimensional Securities and PIM. Sean holds an MS in Business from George Mason University.

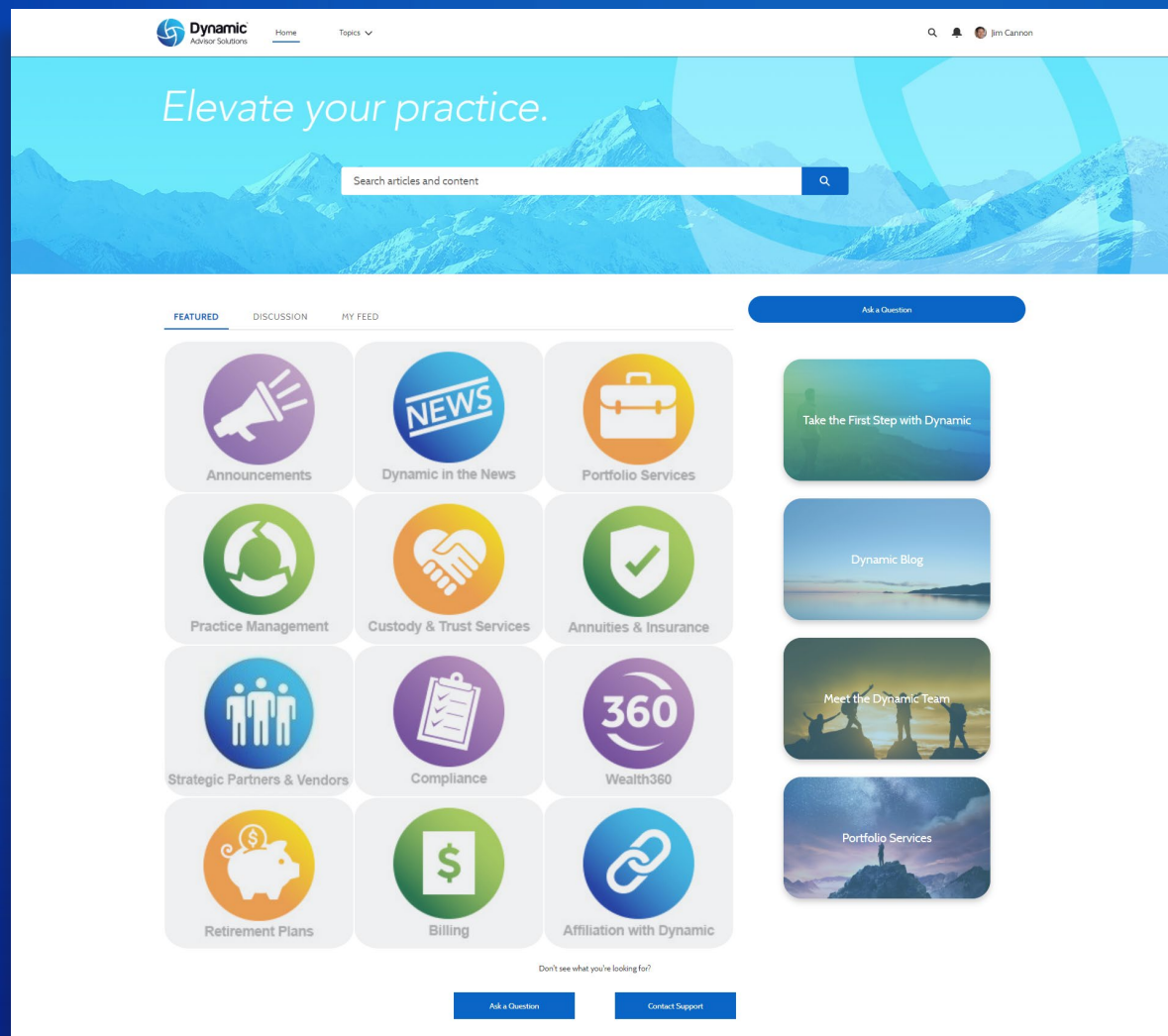


Jessica Elengical
 Head of ESG Strategy, Alternative, DWS
 Jessica is the Head of ESG Strategy for the global Alternative, where she is responsible for integrating ESG into the investment process for all of the business. Before that, Jessica worked in the private equity industry, where she was responsible for investment in energy efficiency, renewable, and green technology as well as development of long-term energy reduction plans for the platform.

Jessica joined DWS in 2015 with over a decade of energy sustainability and finance experience. She holds a BA in Economics from Pennsylvania University and an MBA from The Wharton School, University of Pennsylvania.

COMMUNITIES

INTERNAL COMMUNICATIONS





©2021 All rights reserved Dynamic Advisor Solutions LLC dba Dynamic Wealth Advisors.
Investment advisory services are offered through Dynamic Advisor Solutions, LLC, dba Dynamic Wealth Advisors, an SEC registered investment advisor.

joinus@dynamicadvisorsolutions.com | 2415 East Camelback Road, Suite 700 Phoenix, AZ 85016 | (877) 257-3840