

# Wisdom Wealth Strategies

## Investment Strategy: WWS Green Innovation Strategy



### INVESTMENT PHILOSOPHY

WWS Green Innovation is a forward-thinking strategy focused on the economic transition from fossil fuels to green technologies. The strategy allocates into solar, wind, electric vehicle, and other clean tech.



### INVESTMENT MANAGER OR MANAGEMENT TEAM

Paul M. Hulen  
Senior Vice President, Wealth Management  
30+ years investment experience



### IDEAL CLIENT

WWS Green Innovation is for investors seeking exposure to cutting edge technologies transitioning economies to sustainability. Due to significant changes in renewable technologies suitability is for aggressive capital appreciation seeking investors.



### INVESTMENT PROCESS

Allocate into leading innovative companies addressing overconsumption of natural resources and developing low-carbon solutions.



### SELL DISCIPLINE

Allocations will be considered for modification if a company or industry is not progressing toward profitability. Also, positions in specific companies will be considered for removal if their technology is threatened by other innovations.



### CLIENT REVIEW

Changes in allocations can be made due to valuation, economic conditions, and political decisions at any time. Each position is evaluated against other opportunities on an ongoing basis.

#### CONTACT INFORMATION

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## IMPORTANT DISCLOSURES

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All investments are subject to risk, including loss. There is no assurance that any investment strategy will be successful. Asset allocation and diversification does not ensure a profit or protect against a loss. It is important to review the investment objectives, risk tolerance, tax objectives and liquidity needs before choosing an investment style or manager.

This Fact Sheet is not intended to be a client-specific suitability analysis or recommendation. Do not use this as the sole basis for investment decisions. Do not select an investment strategy based on performance alone.

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In a fee-based account clients pay a quarterly fee, based on the level of assets in the account, for the services of a financial advisor as part of an advisory relationship. In deciding to pay a fee rather than commissions, clients should understand that the fee may be higher than a commission alternative during periods of lower trading. Advisory fees are in addition to the internal expenses charged by mutual funds and other investment company securities. To the extent that clients intend to hold these securities, the internal expenses should be included when evaluating the costs of a fee-based account. Clients should periodically re-evaluate whether the use of an asset-based fee continues to be appropriate in servicing their needs. A list of additional considerations, as well as the fee schedule, is available in the firm's Form ADV Part 2 as well as the client agreement.

## ASSET CLASS RISK CONSIDERATIONS

Every type of investment, including mutual funds, involves risk. Risk refers to the possibility that you will lose money (both principal and any earnings) or fail to make money on an investment. Changing market conditions can create fluctuations in the value of a mutual fund investment. In addition, there are fees and expenses associated with investing in mutual funds that do not usually occur when purchasing individual securities directly.

***This strategy may contain Mutual Funds. Investors should carefully consider the mutual fund investment objectives, risks, charges and expenses before investing. The prospectus contains this and other information and can be obtained from the Mutual Fund sponsor as well as from your financial advisor. The prospectus should be read carefully before investing.***

**Equities:** Investors should be willing and able to assume the risks of equity investing. The value of a client's portfolio changes daily and can be affected by changes in interest rates, general market conditions and other political, social and economic developments, as well as specific matters relating to the companies in which the strategy has invested. Companies paying dividends can reduce or cut payouts at any time.

**Fixed Income:** All fixed income securities are subject to market risk and interest rate risk. If fixed income securities are sold in the secondary market before maturity, an investor may experience a gain or loss depending on the level of interest rates, market conditions and the credit quality of the issuer. There is an inverse relationship between interest rate movements and bond prices. Generally, when interest rates rise, bond prices fall and when interest rates fall, bond prices generally rise. Please note these strategies may be subject to state, local, and/or alternative minimum taxes. You should discuss any tax or legal matters with the appropriate professional.

**Sectors:** Strategies that invest primarily in securities of companies in one industry or sector are subject to greater price fluctuations and volatility than strategies that invest in a more broadly diversified strategies. The Strategy may have over-weighted sector and issuer positions and may result in greater volatility and risk. Investing in small cap stocks generally involves greater risks, and therefore, may not be appropriate for every investor. The prices of small company stocks may be subject to more volatility than those of large company stocks.

Dividends are not guaranteed and must be authorized by the company's board of directors.



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