

## INVESTMENT OBJECTIVES

Model Capital's American Revival Portfolios™ are diversified portfolios designed to take advantage of expected growth in the coming years. Their objectives include:

### Growth

- The manager expects U.S. economic growth to revitalize in the coming years. American Revival Portfolios™ are invested in U.S. asset classes expected to take advantage of this trend.

### Sectors

- Preference is given to sectors which would benefit from expected growth policies and trends, including Technology, Defense, and Health Care.

### Income

- As higher growth is likely to be accompanied by rising interest rates, American Revival Portfolios™ emphasize those income assets that are expected to outperform in such an environment.

Accounts are opened at Interactive Brokers LLC, and professionally managed by Model Capital Management LLC, a registered investment advisor.\*

## DRIVEN BY YOUR RISK PROFILE

Your unique situation and risk tolerance will define the investment mix suitable for you as an investor. Our American Revival Portfolios™ range in their risk profile from Income to Growth-Plus. Let us find the one that works for you!

Risk Profile	Equity Allocation, Min/Max %	Typical Investor Profile
Income	0%	Income requirement, risk averse
Conservative	17.5% - 30%	Income & conservative growth
Balanced	35% - 50%	Income & growth, moderate risk
Growth	40% - 60%	Looking for growth, can withstand risk
Growth-Plus	47.5% - 70%	Growth oriented, high risk tolerance

\*Please see disclosures on next page for more information.

## IMPORTANT ANSWERS

There are important questions you should ask when evaluating financial advisors:

**Q: What services do you provide?**

**A:** We provide investment advice, design your asset allocation, and manage your investment portfolio. We do not provide financial planning services or tax advice.

**Q: What are your fees?**

**A:** Our 0.75% annual advisory fee is all-inclusive for client accounts over \$50,000.\* See our web site to compare fees.

**Q: What exactly am I paying for?**

**A:** You are hiring a professional advisor to design and manage your investment portfolio.

**Q: Are you acting in my best interest, as a fiduciary?**

**A:** Being independent (not affiliated with a broker-dealer) allows us to avoid many conflicts of interest in our role as a fiduciary – putting client interests first. We do not earn product sales or trading commissions.

## HOW TO INVEST

Please follow these simple steps:



Visit our web site, [investmcm.com](http://investmcm.com), and complete the Risk Questionnaire which will help determine your risk profile. Minimum account balance is \$20,000.

Ready to invest?

Contact us: email [contact@investmcm.com](mailto:contact@investmcm.com), call 617-854-7417, or fill contact form on [investmcm.com](http://investmcm.com)

**About Us:** Model Capital Management LLC (“MCM”) is an investment advisor registered in the Commonwealth of Massachusetts. “American Revival Portfolios” is a trademark of Model Capital Management LLC. Brokerage and custody services are provided by Interactive Brokers LLC.

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\* **Fee disclosure:** For account balances under \$50,000, MCM does not cover trade [commissions](#) or fees charged by Interactive Brokers LLC which are passed through to client accounts. MCM covers broker’s trade commissions for accounts over \$50,000.