



TRU||VESTMENTS

Through a partnership created on September 29, 2023, Manning Silverman, Tax & Beyond and Truvestments became the leading-edge tax planning and holistic wealth management company in Chicago and beyond, now providing all current clients, and future prospects, with full financial services under one roof.

Decades of expertise now available at your fingertips and a full team in place to support client needs as they arise and expand over time.

Services which can be provided as clients need

Full tax planning and preparation expertise, as always, and now including...

Portfolio & Asset Management

Estate Planning

Annuity Reviews

Tax-Free Income

Retirement Planning

Risk Management

M&A Insights

Wills & Trusts Reviewed

Retirement Plans Designed & Managed

The goals are not to create another job for you.

The benefit is to work as a team – FOR the client.

We are here to do the work that was missing and being done elsewhere. Now, it will be done under the Manning Silverman roof, as a team effort.

When the client raises their hand with a need or question, you can confidently direct them to your wealth management team. Workflows are in place to trigger the correct actions and make sure all is taken care of, in a cohesive and productive manner, without interfering with your vital client focus and expertise.

Your Manning Silverman Support Team:

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Alyssa's email: alyssa@truvestments.com

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The Manning Silverman Wealth Management Client Hotline:
1-833-548-0044

Client Handouts for your use:

Would a second opinion
be helpful?

Are you comfortable your goals are being
productively met—or would a second
opinion and fresh insights help you?

Do you really know what you are paying
for your financial planning tools and
portfolio management?

Is that annuity the most cost-effective
and productive for you?

Is that annuity invested in the
correct channels for your needs?

Is your estate covered for
health and tax purposes?

Is your portfolio producing tax-
advantaged income wherever possible?

Does your retirement plan provide
you the most tax-advantaged income
you can receive, along with the highest
tax reductions for you and/or your
company?

We are more than happy to
address any of your questions.
Call to set your review:

1-833-548-0044

@clientservices@truvestments.com

Let's chat!

Let's get together on a call or a Zoom – to
review these elements for you. As
fiduciaries working for your interest, our job
is to make sure you and yours are positioned
to benefit from the surprising elements
ahead for the US economy.

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of interest arises, it will be disclosed to the Client.

Manning Silverman
& Company
CERTIFIED PUBLIC ACCOUNTANTS

TRUVESTMENTS

CONSIDER THIS...

Is my wealth
management plan
accomplishing what I
need to reach my goals?

Tax & Beyond Trifold

Manning Silverman Trifold

Would a second opinion be helpful?

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Tax & Beyond
Tax & Business Services

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CONSIDER THIS...

Is my wealth
management plan
accomplishing what I
need to reach my goals?

THE DRIVING FORCE: DEMOGRONOMICS®

UPSIDE SURPRISES IN 2024, 2025 AND BEYOND – THE STAGE IS SET

As everything speeds up and expands, it seems that only the bad news grabs center stage. Alas, **much good** is also boiling just under the surface. Supply chains are being repaired and massive manufacturing buildout is unfolding. All while onshoring proceeds and significant improvements in costs, wages and margins lay ahead. Be prepared: from the pace of corrections to the speed of adaptation by U.S. companies, we expect the rate of change to remain dizzying.

Corrective periods always rattle crowd psyche, as they are driven further into a reactionary stance by the waves of media headlines. We remain focused on the long-term horizon ahead, while striving to position clients for the significant opportunities hidden in the **decades of disruption** ahead. Stay patient.



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Any and all references herein to portfolio elements, positions or results are from past performance and include no back-testing. It is vital to always understand that past performance does not, in any way, reference, imply, direct, suggest, promise or guarantee any matter or result related to any possible future performance. All investing carries risk and can result in the entire loss of capital invested. Nothing in this presentation is FDIC guaranteed and should never be perceived as such.

Any opinions shared herein are from the presenter only and are subject to change at any time. Fee-based financial planning and investment advisory services are offered by Truvestments Capital, LLC, a SEC-Registered Investment Advisor..

An Insider's Look

Being prepared for
the Significant Waves
of Change Ahead



Positives from 50,000 Feet

When markets are traversing through **corrective actions**, it is easy to become stressed and too focused on the short-term noise. Strive to not get caught up in the daily media effort to suck you into the now endless maze of fears.

We remain focused on the massive waves of change ahead. The hurdle is to accept the larger idea that ***years like 2022-2023 are required elements*** - for what become building blocks of future returns.

The generational, technological and disruptive shifts flowing through the US economy now will impact **all** we see and do. More “everything” is coming as demand builds, manufacturing sprouts and A.I. just gets started on a new cycle of evolution.

Our Job? Help clients buckle up and adapt to the increased pace of change in the years ahead!



ALWAYS FOCUS ON THE
UNDERLYING CURRENT

NOT THE WAVES IN THE STORM



MASSIVE CHANGE REMAINS AHEAD...
PATIENCE IS SET TO BE REWARDED, LIKE IT
ALWAYS HAS BEEN IN THE PAST.

AS WE HAVE PROMISED SINCE WE SERVED
OUR FIRST CLIENT, WE MUST REMAIN
DISCIPLINED – AND REMEMBER THIS:

THERE WILL **ALWAYS** BE ANOTHER
ARMAGEDDON
WAITING IN THE WINGS



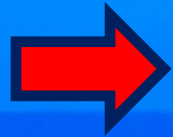
FEAR

Acts like a blinder...

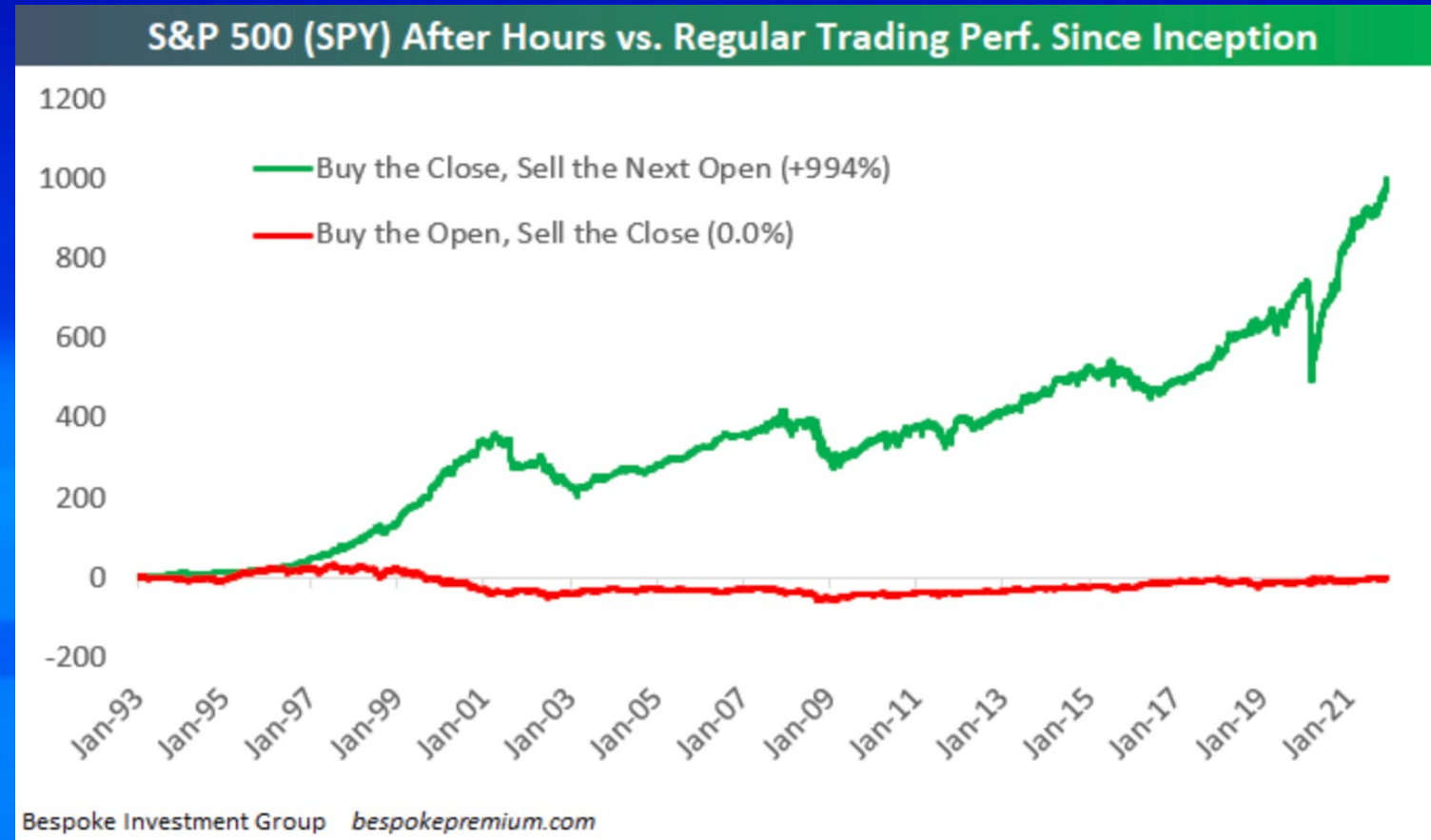
...history proves that successful planning and end results tend to be based on this fact:

It's not about what's now...it is about what's next

This is what happens when reacting to “news or politics.” This usually unfolds during waves of emotions – costing you much – consistently - over time.



Note the cost of doing battle: **994% to 0%**



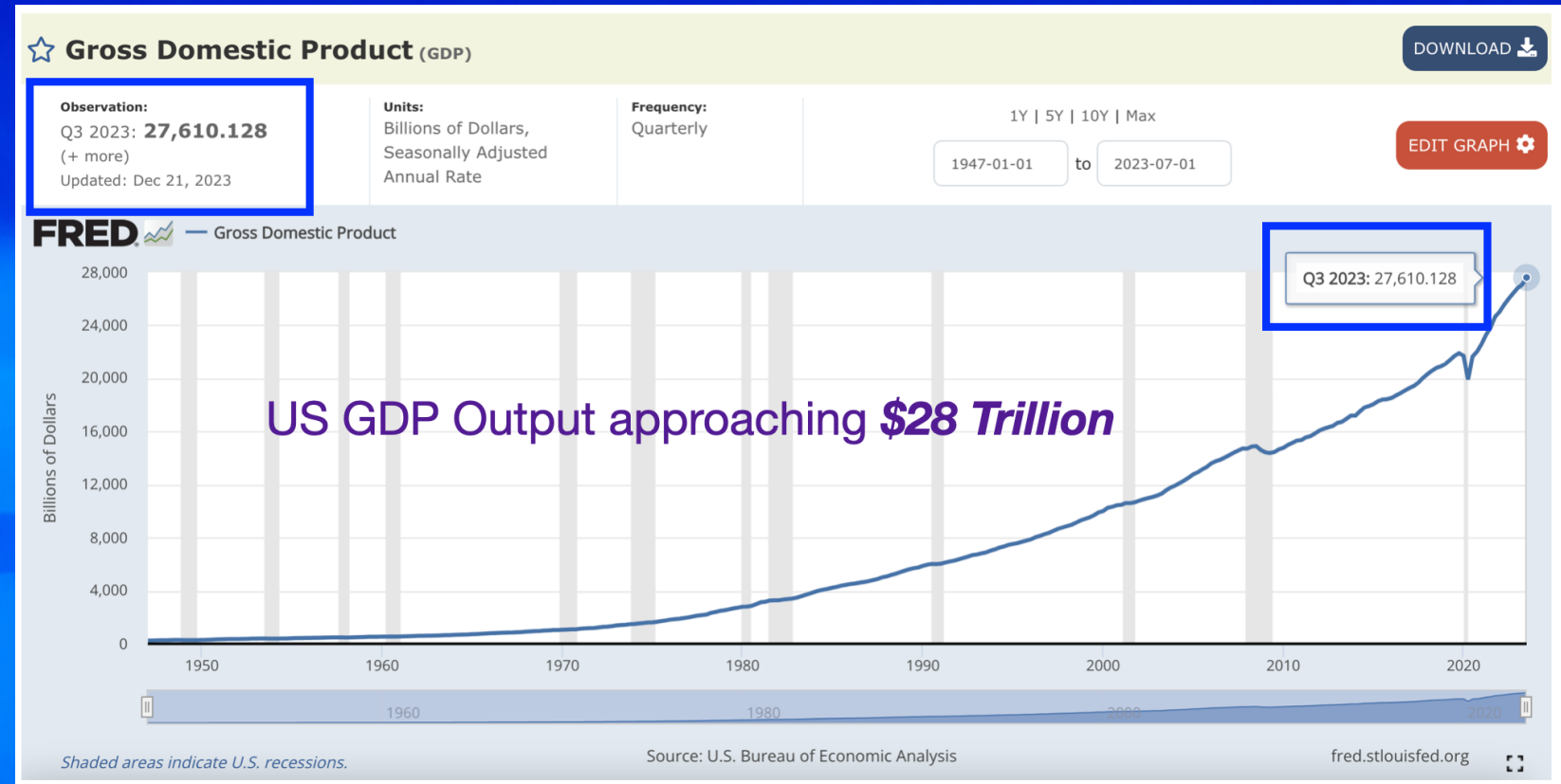
There is a monster in all of us – it’s called fear. Successful investors must learn this early in the game: He or she who does battle with their monster the fewest times possible – **wins**.

The Long-Term Cost of Reacting Emotionally

For anyone who wanted to listen, the media has created a narrative that we are somehow in a recession. **We are not.**



On the contrary, the upward trajectory unfolding is the steepest in decades. Buckle up – that's good news.



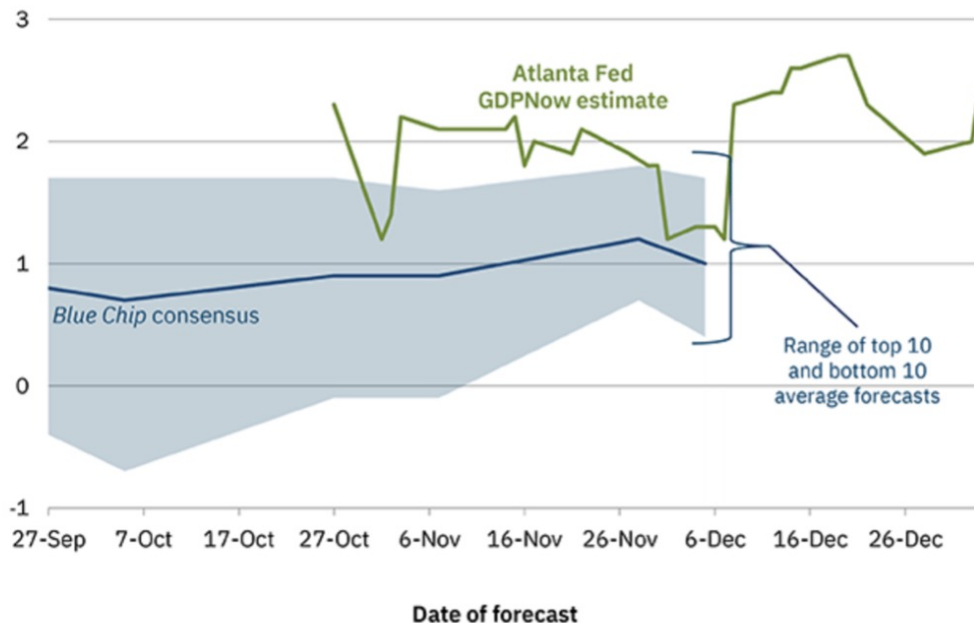


Latest estimate: 2.5 percent -- January 03, 2024

The GDPNow model estimate for real GDP growth (seasonally adjusted annual rate) in the fourth quarter of 2023 is **2.5 percent** on January 3, up from 2.0 percent on January 2. After this morning's release of the ISM Manufacturing Index from the Institute for Supply Management, the nowcasts of fourth-quarter gross personal consumption expenditures growth and fourth-quarter gross private domestic investment growth increased from 2.4 percent and -0.4 percent, respectively, to 2.9 percent and 0.5 percent

The next GDPNow update is **Tuesday, January 9**. Please see the "Release Dates" tab below for a list of upcoming releases.

Evolution of Atlanta Fed GDPNow real GDP estimate for 2023: Q4
Quarterly percent change (SAAR)



Sources: Blue Chip Economic Indicators and Blue Chip Financial Forecasts

On top of a \$27.6 Trillion Economy in Q3

The better news?



That won't change in the Q4 2023 data to come as the US economy went out, still on an uptrend....

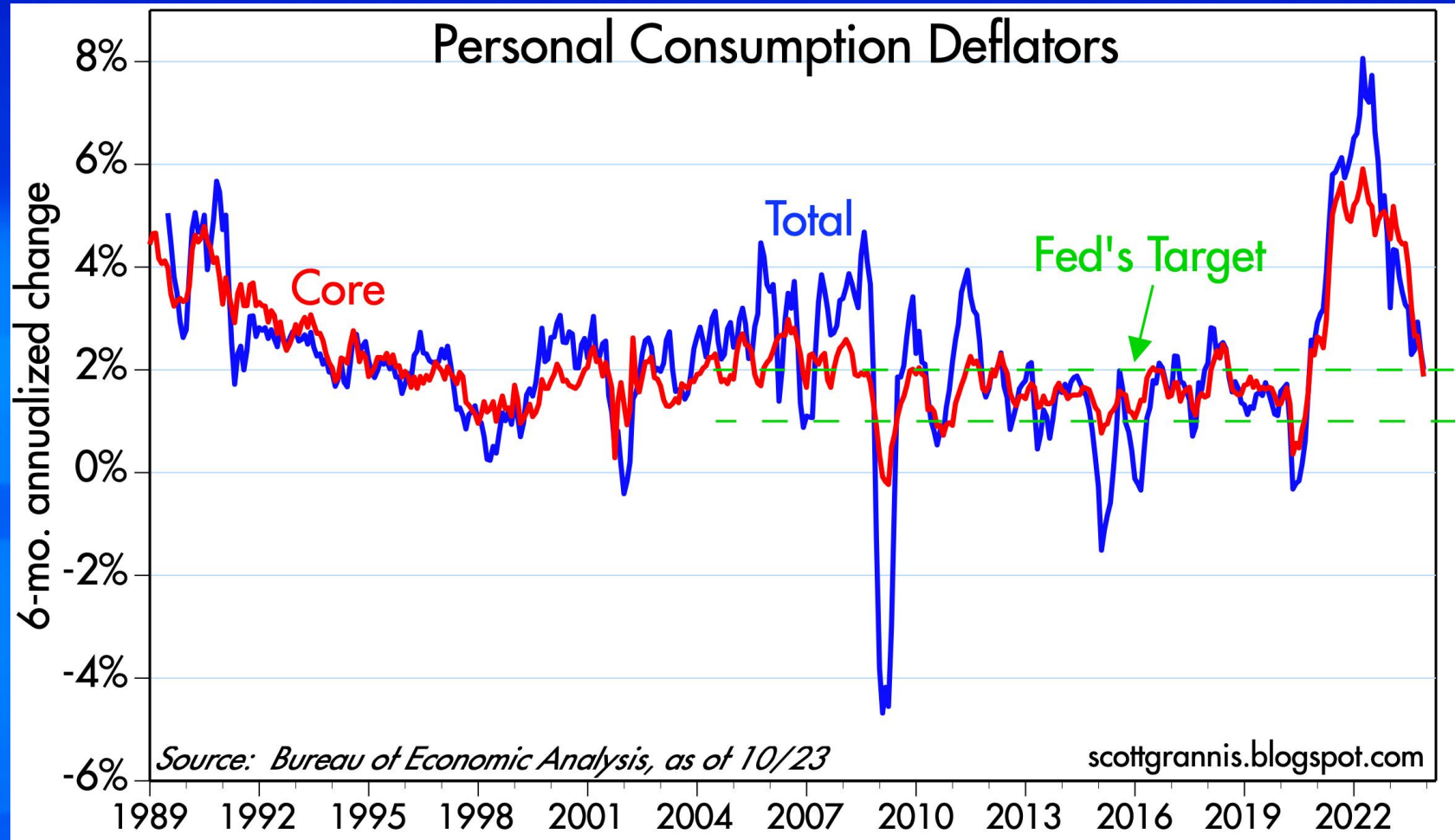
...above 2% growth!



What inflation pressure?

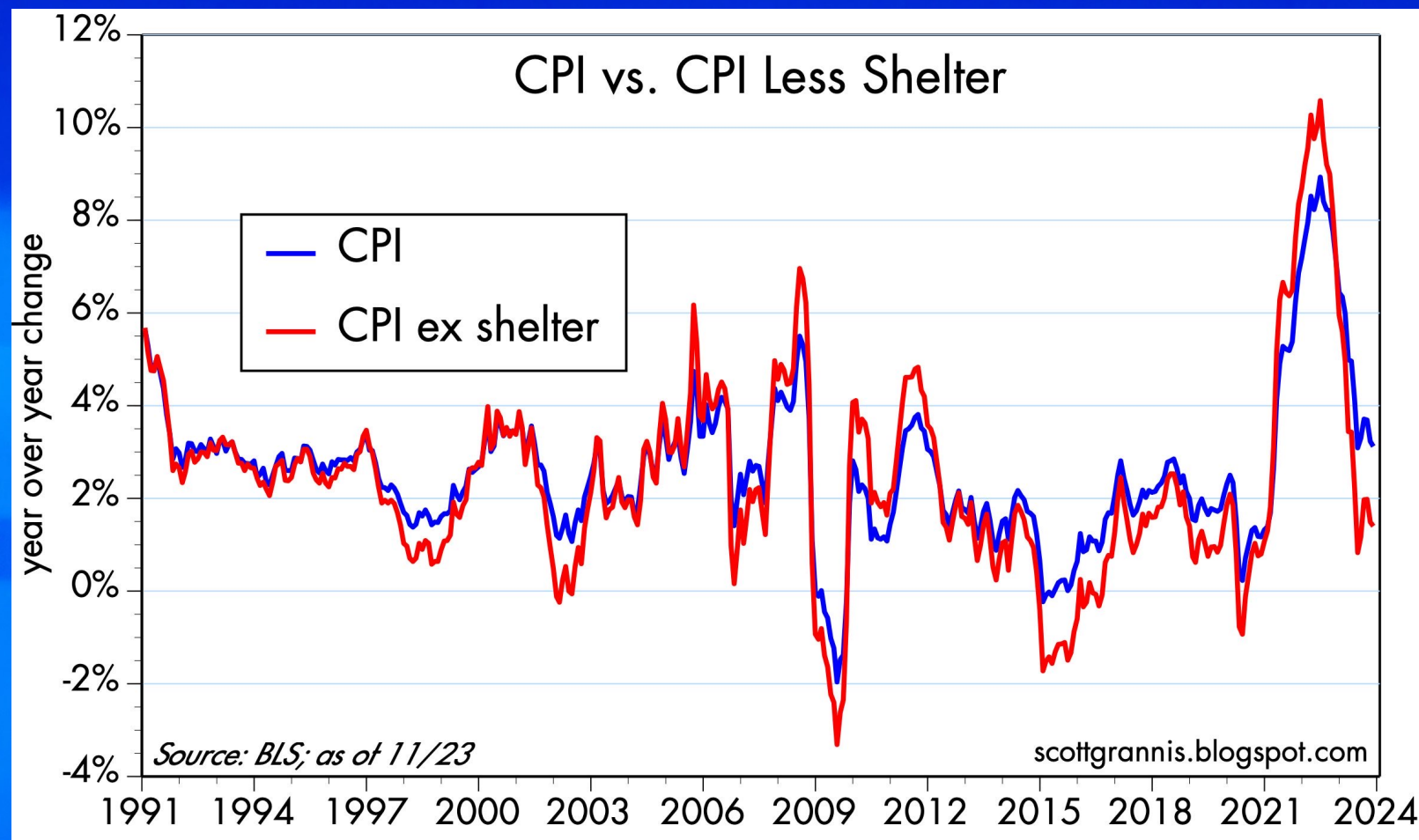
It has been rolling over for months at the Personal Consumption levels - and will eventually disappear from the headlines.

The train will always leave the station with the fewest on board!



The lagging effect of some indicators has caused confusion.

Amazing fact: the 6-mo. annualized rate of change of the CPI less shelter has been 2% or less for 11 of the past 12 months!

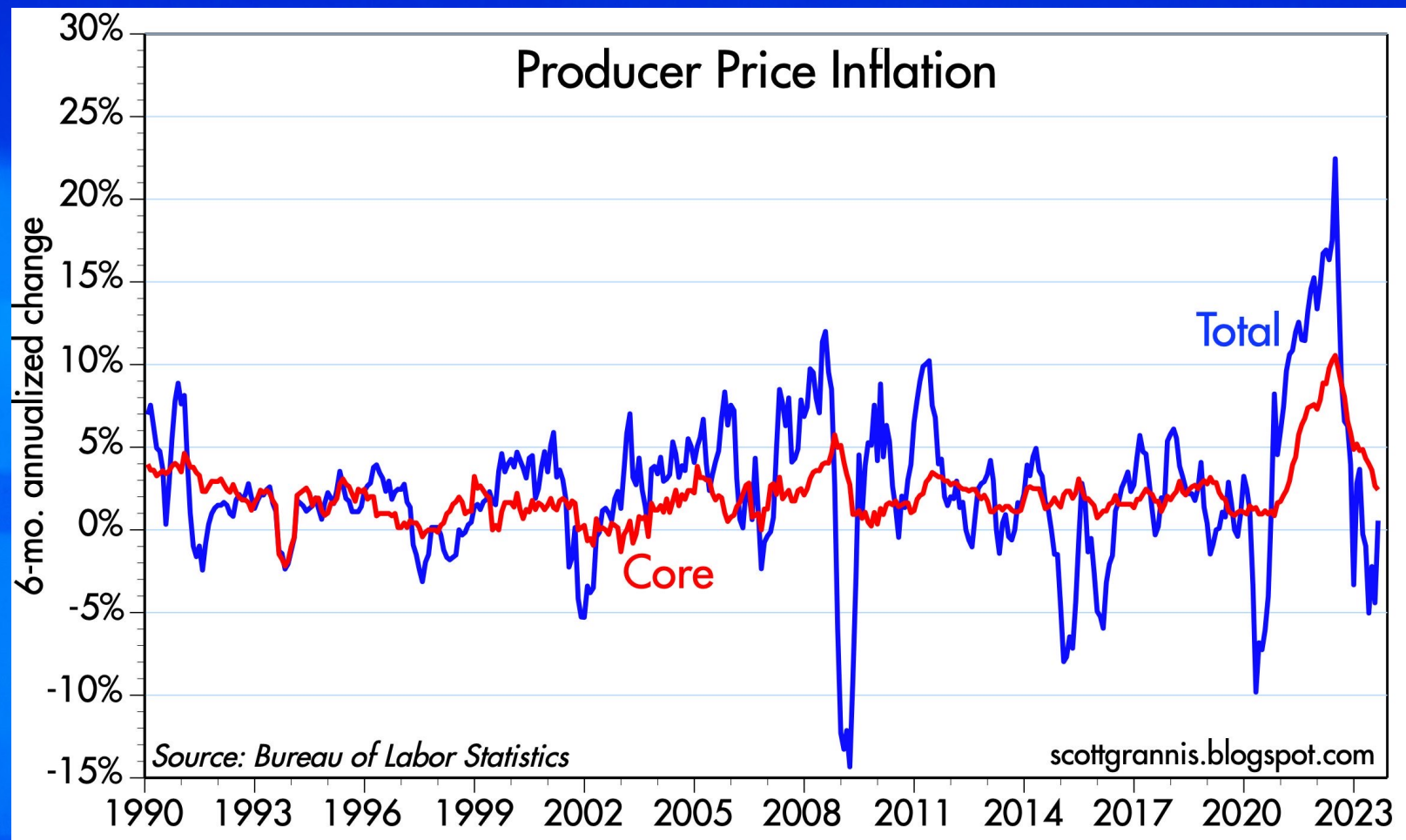


Stop the hype and fear.

PPI is approaching deflationary mode, even as headlines keep investors on edge.

As seen in money market records set, money and liquidity are still abundant.

The bulk of our inflation problem has dried up.





An important lesson for the next couple decades:

**Doing what everyone else does,
Gets you what everyone else gets.**

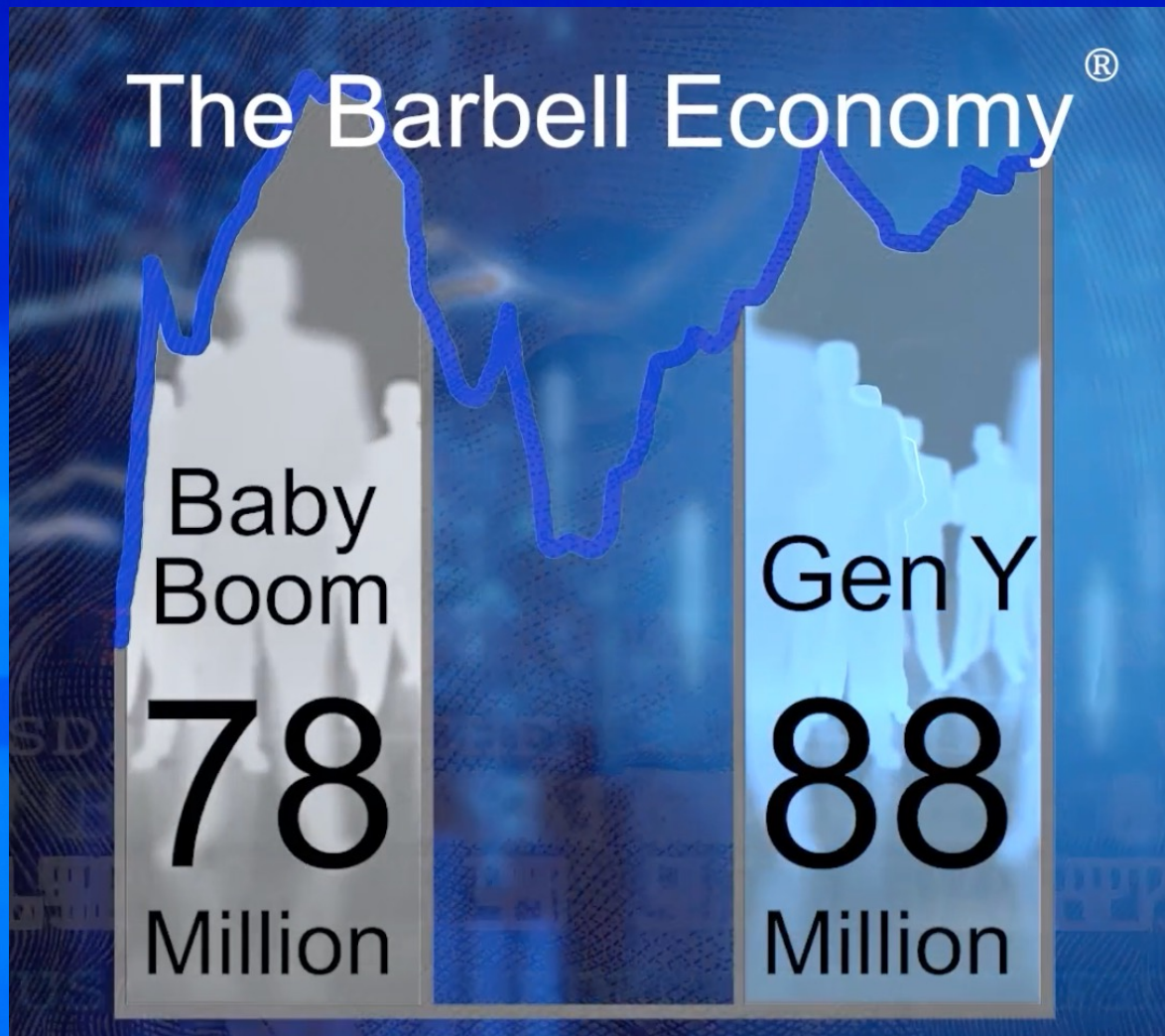
The economic forces driving us all forward are vastly more powerful than currently understood.

Als, while it always sounds “smarter” to express all the terrible things that can happen along the way, fear-based investing never wins over time.

Our job is to help clients understand and embrace the much larger events unfolding under the surface, which will continue to benefit those prepared, for decades to come.

People Make Markets®





- Running out of houses
- More jobs open than people to fill them – to keep up with demand
- Contributing to the “production squeeze” we experienced, driving “inflation fears”
- Jewelry stores record engagement ring sales
- Wedding locations booked 18+ months out
- Next? More everything...and a whole new batch of births



GENERATION Y – BRILLIANT & DRIVEN BY TECHNOLOGY

Take Note: If you are worried about
“Generation Y”, don’t be...

...most have long forgotten what the
“Baby Boomer” generation looked like
- just before they spent 25 years
building more wealth than any
generation before them...





FLOWER
POWER

MARTES
TUESDAY

PACHA

PACHA

FLOWER
POWER
PACHA

It will “feel” scarier than before. It will feel like the bottom is going to drop out from under your feet more often than you care to ponder...that is the mental response to larger numbers.

The Reality:

The US economy has never experienced the new paradigm of demand ahead. As we build toward a higher level of “equilibrium”, many things will look like they don’t work. This is where technology, manufacturing expansion and Capex/Tech upgrades will surprise bearish investors.





CLOUD TECHNOLOGY
EDGE COMPUTING
ROBOTICS & DRONES
VIRTUAL REALITY
ARTIFICIAL INTELLIGENCE
SELF-DRIVING EVERYTHING
NANO-TECHNOLOGIES



MEDICAL BREAKTHROUGHS IN
BIOTECH

SPACE TRAVEL, FARMING, PHARMA
& COLONIZATION

MOBILE EVERYTHING

THE ENERGY SHIFT

WIND, SOLAR, HYDROGEN

...AND THE LIST GOES ON

The Barbell Economy® Portfolios

The portfolios have been built with a specific focus on Dividends, Technology, Growth and Biotech, each addressing needs in these areas. The wealth management planning process we help clients maintain on their pathways ahead can address their needs, often using a blend of these portfolios as goals and risk preferences are defined and change over time.

SELECT A PORTFOLIO BELOW TO LEARN MORE



Barbell Economy®
Dividend Income Portfolio

[VIEW PORTFOLIO >](#)



Barbell Economy®
Growth Portfolio

[VIEW PORTFOLIO >](#)



Barbell Economy®
Tech Portfolio

[VIEW PORTFOLIO >](#)



Barbell Economy®
Biotech Portfolio

[VIEW PORTFOLIO >](#)

Barbell Economy Dividend Income Portfolio

This Portfolio focuses on companies with a long-term history of consistent annual dividend growth. Underlying that quantitative process, we focus on companies we feel are “in the way” of coming waves of demand as the next generation takes control of the US economy – using the same benefits of the Barbell Economy. History shows dividends play a positive role in returns over long periods of time for patient investors. It is important to note also the general “character” activity a dividend portfolio tends to exhibit. During times of difficult market action to the downside, dividends tend to fall less. Think of it as a shock absorber effect. On the other hand, when markets are in a general growth mode, you will see that dividend portfolios tend to lag a bit behind the general market. The focus over time? Expanding annual dividend income. Note also that as Technology brings greater benefit to expanding areas of our lives, the Barbell Dividend Portfolio will struggle to “beat” the S&P 500 due to its extraordinary technology market weighting. For example, at the time of this posting, Apple and Microsoft alone now comprise over 14% of the S&P 500. Hence, we have provided comparisons to S&P 500 market-weight, equal-weight and dividend ETF results for all to review.

History and Statistics	2015*	2016	2017	2018	2019	2020	2021	2022	2023	Cumulative Results**
NYSE Composite Index	-6.63	9.01	15.84	-11.20	21.88	4.40	18.17	-11.53	10.99	50.93
Barbell Dividend Income Portfolio	3.19	16.57	16.65	-5.08	24.75	9.78	21.98	-10.67	11.43	88.60
Barbell Net Difference (%)	9.82	7.56	0.81	6.12	2.87	5.38	3.81	0.86	0.44	37.67
S&P 500 Index	-0.73	9.54	19.42	-6.94	28.71	16.26	26.85	-19.65	24.23	97.69
Barbell Dividend Income Portfolio	3.19	16.57	16.65	-5.08	24.75	9.78	21.98	-10.67	11.43	88.60
Barbell Net Difference (%)	3.92	7.03	-2.77	1.86	-3.96	-6.48	-4.87	8.98	-12.80	-9.09
Equal-Weighted S&P 500 (RSP)	-4.52	13.36	17.94	-9.57	24.89	10.21	24.25	-13.79	13.70	76.47
Barbell Dividend Income Portfolio	3.19	16.57	16.65	-5.08	24.75	9.78	21.98	-10.67	11.43	88.60
Barbell Net Difference (%)	7.71	3.21	-1.29	4.49	-0.14	-0.43	-2.27	3.12	-2.27	12.13

Portfolio Stats Summary

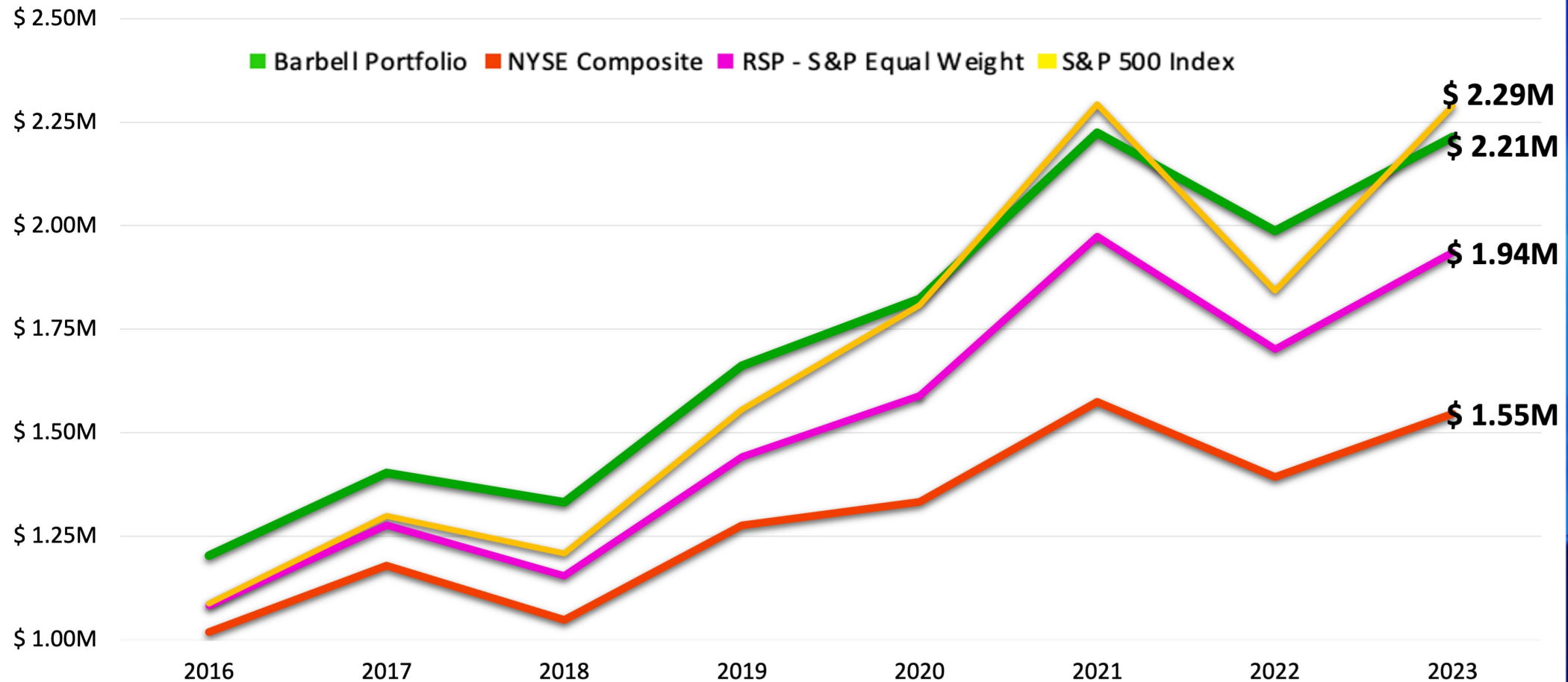
Positions Starting 2024	49
Average Annual Turnover	23.28%
Average Start 2024 Yield	5.19%

*from June 30, 2015 onward

**Non-compounded returns

DISCLOSURES: These summaries are gross of fees as every advisor may choose a different fee for their clientele. Any investor using these portfolios must also assume an additional cost will be added and net results will differ. Typically, that cost ranges from 0.75% to 1.75% depending on account size and the services rendered. Finally, these results cover periods when management research the portfolio in-house only. It was offered for portfolio use as of 06/30/2015 to clients and other advisors for use with their clientele. It is highly likely that varying results were reached by outside parties where management was not in control of the trading or advisory service for a particular client. Past performance is never a guarantee of any future results. Please consult your advisor before making any investment decisions. Nothing in this material is intended to be investment advice. Reference to any specific security does not constitute an offer to buy or sell securities in any jurisdiction. All public data received from what are expected to be reliable sources. Truvestments Capital, LLC is not responsible for any damages or losses arising from any use of this information. Fee-based investment advisory services are offered through Truvestments Capital, LLC, a SEC-registered investment advisor. All data through DECEMBER 31, 2023. Copyright 2024. All Rights Reserved.

Barbell Economy Dividend Income Portfolio Comparison (\$1,000,000 Starting Value in 2015)

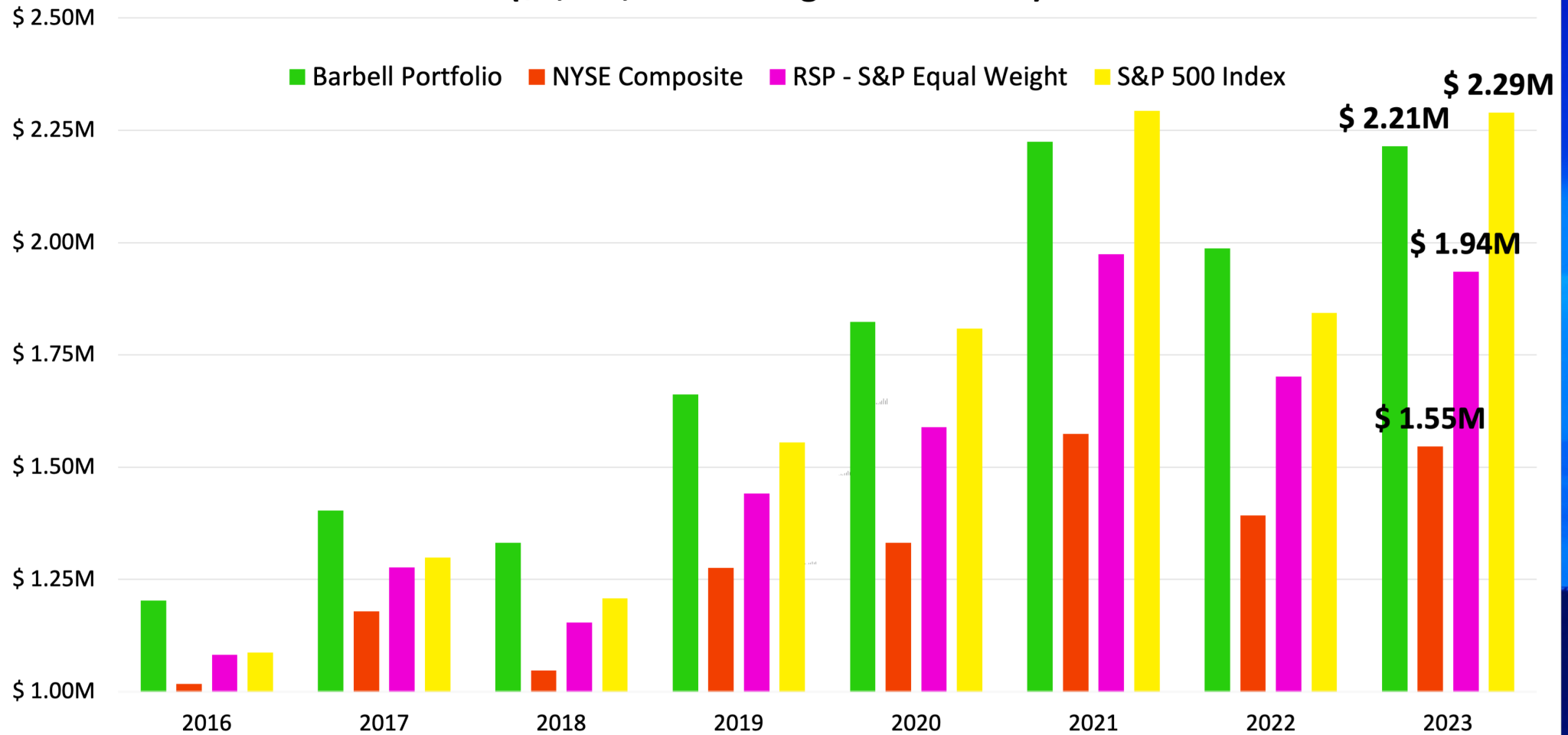


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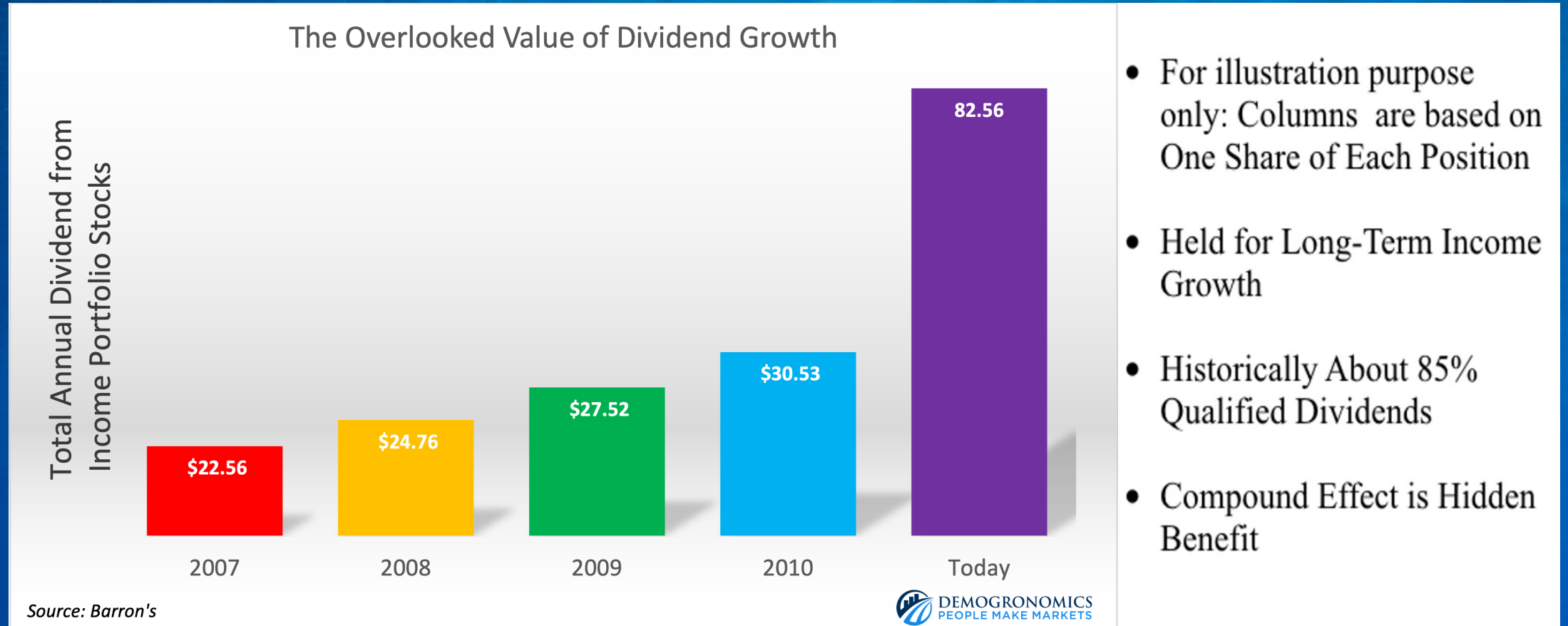
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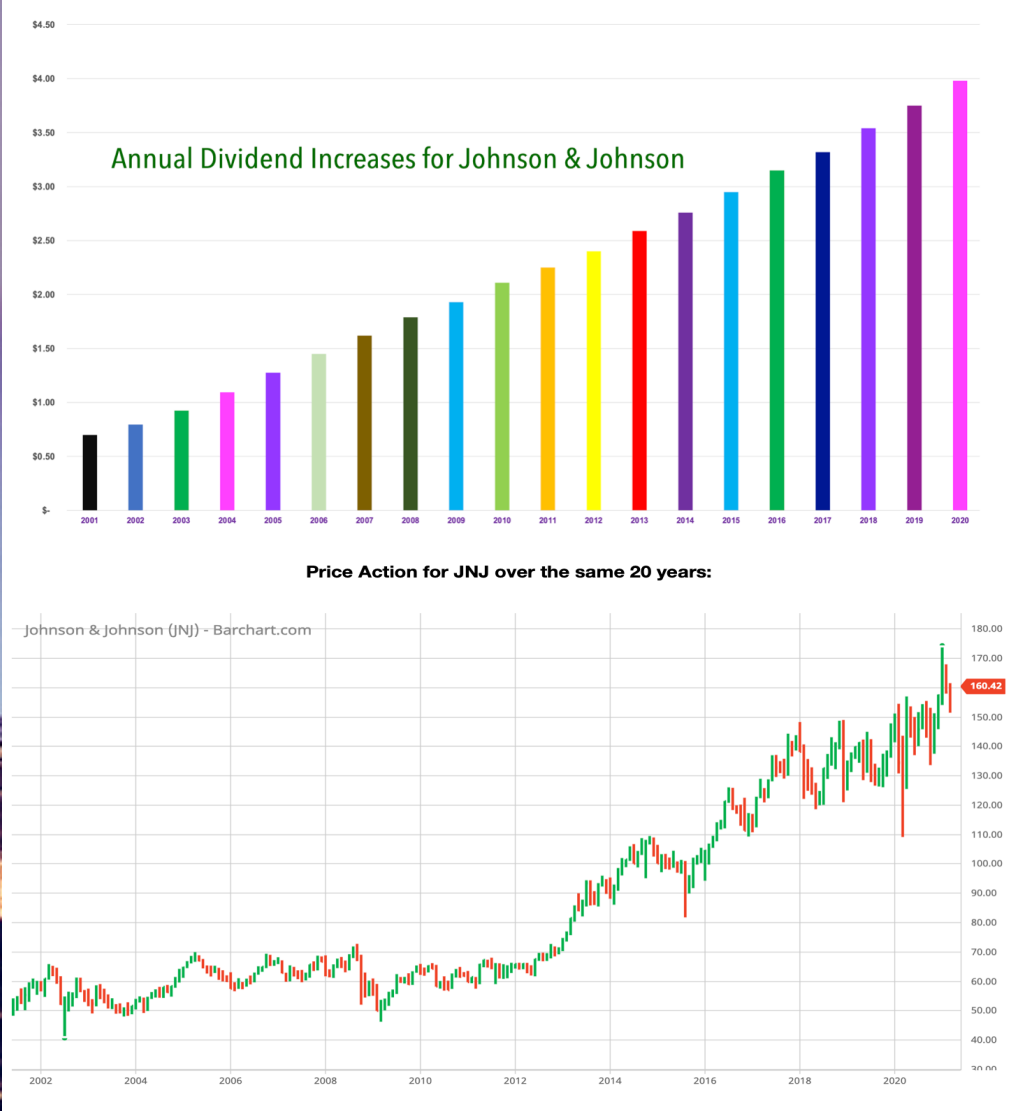
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The most often overlooked value in the markets?



...*compounding* dividend income growth

Which is easier to watch?



...Dividend Growth or choppy price movement?

Barbell Economy Growth Portfolio

The Portfolio puts less weight on current dividend income and instead places more focus on companies which management feels are expanding within the economic channels defined by the Barbell Economy and unfolding demographic trends. Given a higher focus on perceived future growth characteristics, all investors can expect a greater range of volatility during difficult or strained market conditions. The portfolio consists of companies with growth objectives and/or strategies we feel are within the expected channels of expansion as the generations which weigh heavily on the Barbell effect in the US economy age into the years ahead. It remains our view that as the 2020s and 2030s unfold, growth is set to continue to surprise to the upside, even as markets are compressed during normal, expected setback windows of time ahead.

History and Statistics	2012*	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Cumulative Results**
NYSE Composite Index	12.92	23.17	4.22	-6.41	9.01	15.84	-11.20	21.88	4.40	18.17	-11.53	10.99	91.46
Barbell Growth Portfolio	18.23	39.94	15.32	3.74	19.90	20.03	-12.28	26.95	42.43	23.91	-15.45	36.86	219.58
Barbell Net Difference (%)	5.31	16.77	11.10	10.15	10.9	4.19	-1.08	5.07	38.03	5.74	-3.92	25.87	128.12
S&P 500 Index	13.41	29.60	11.39	-0.73	9.54	19.42	-6.94	28.71	16.26	26.85	-19.65	24.23	152.09
Barbell Growth Portfolio	18.23	39.94	15.32	3.74	19.90	20.03	-12.28	26.95	42.43	23.91	-15.45	36.86	219.58
Barbell Net Difference (%)	4.82	10.34	3.93	4.47	10.4	0.61	-5.34	-1.76	26.17	-2.94	4.20	12.63	67.49
Cumulative Annual Result	1 YR	3 YRS	5 YRS										
NYSE Composite Index	10.99	17.63	43.91										
Barbell Growth Portfolio	36.86	45.32	114.70										
Barbell Net Difference (%)	25.87	27.69	70.79										
S&P 500 Index	24.23	31.43	76.40										
Barbell Growth Portfolio	36.86	45.32	114.70										
Barbell Net Difference (%)	12.63	13.89	38.30										

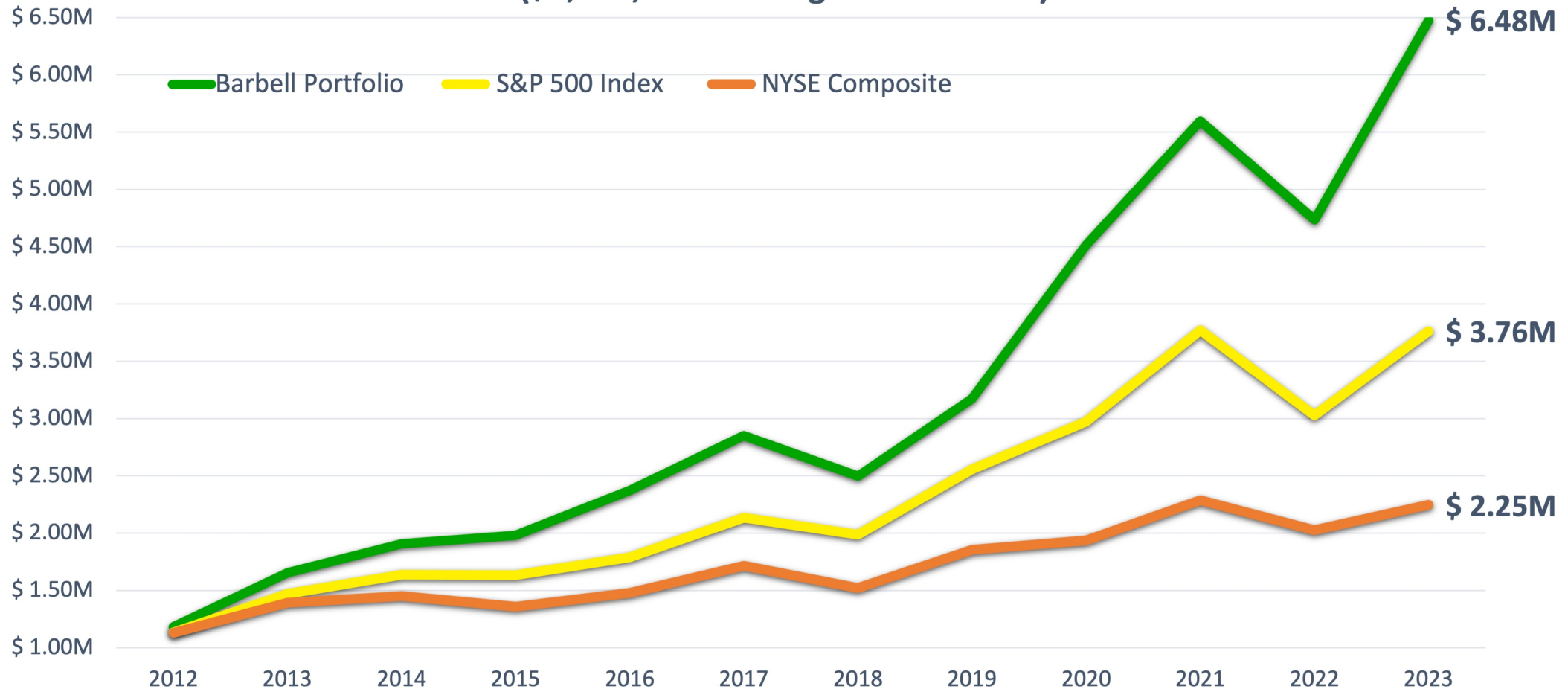
*Portfolio Began 01/01/2012

**Non-Compounded Returns

Portfolio Statistics	
49	Starting Positions 2024
22.16%	Annual Turnover
2.02%	Starting Yield 2024

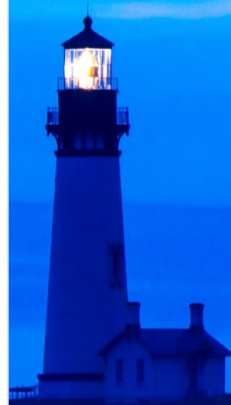
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Barbell Economy Growth Portfolio Comparison (\$1,000,000 Starting Value in 2011)

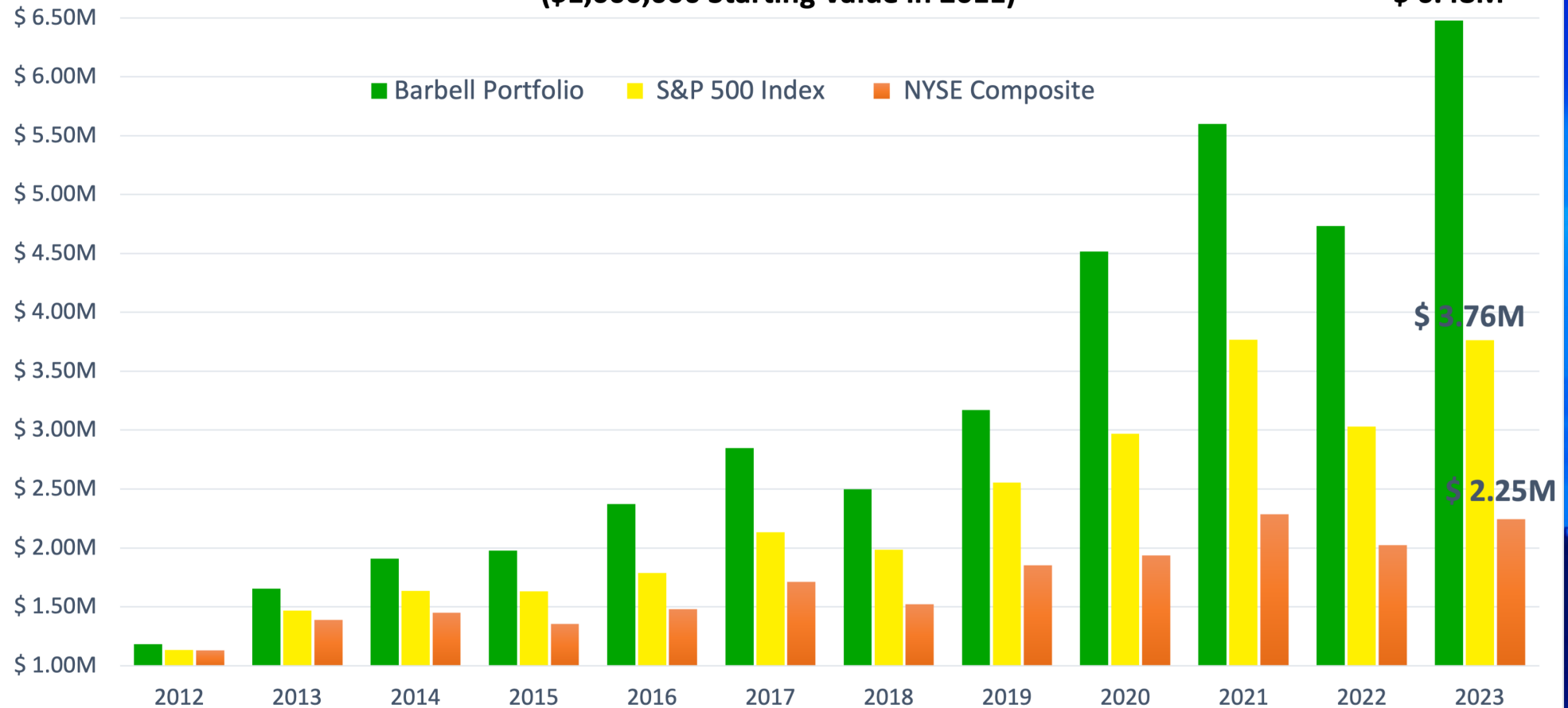


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Barbell Economy Growth Portfolio Comparison (\$1,000,000 Starting Value in 2011)



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Barbell Economy Tech Portfolio

Generation Y is the most technologically advanced generation to ever inhabit the planet. The impact their technological prowess will have on our lives will redefine the word change. And when we say change – we mean change in ways that cannot be comprehended or defined effectively today. The tech world will bring tools, cloud channels, deep software and gadgets to us at light speed – all of which will make life easier, more efficient, closer. The power of Generation Y, their record size and the powder keg of technology they have grown up on and are creating daily, is collectively set to power all of us into a reality which will shock our senses. The price? A demand for patience and discipline - and acceptance of **more volatile positions** and a portfolio which will likely change more often due to buyouts and/or replacements.

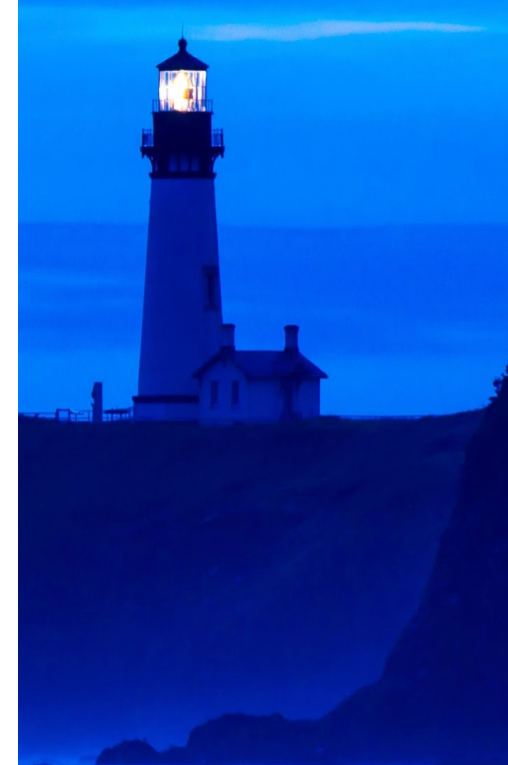
History and Statistics	2017*	2018	2019	2020	2021	2022	2023	Cumulative Results**	
NYSE Composite Index	11.10	-11.20	21.88	4.40	18.17	-11.53	10.99	NYSE Composite Index	43.81
Barbell Tech Portfolio	21.85	-2.28	31.69	72.56	28.42	-28.96	41.73	Barbell Tech Portfolio	165.01
Barbell Net Difference (%)	10.75	8.92	9.81	68.16	10.25	-17.43	30.74	Barbell Net Difference (%)	121.20
S&P 500 Index	10.84	-6.94	28.71	16.26	26.85	-19.65	24.23	S&P 500 Index	80.30
Barbell Tech Portfolio	21.85	-2.28	31.69	72.56	28.42	-28.96	41.73	Barbell Tech Portfolio	165.01
Barbell Net Difference (%)	11.01	4.66	2.98	56.3	1.57	-9.31	17.50	Barbell Net Difference (%)	84.71
Nasdaq Composite Index	10.67	-3.88	33.60	43.64	21.38	-33.10	43.42	Nasdaq Index	115.73
Barbell Tech Portfolio	21.85	-2.28	31.69	72.56	28.42	-28.96	41.73	Barbell Tech Portfolio	165.01
Barbell Net Difference (%)	11.18	1.60	-1.91	28.92	7.04	4.14	-1.69	Barbell Net Difference (%)	49.28

*Portfolio Beginning Date June 1, 2017

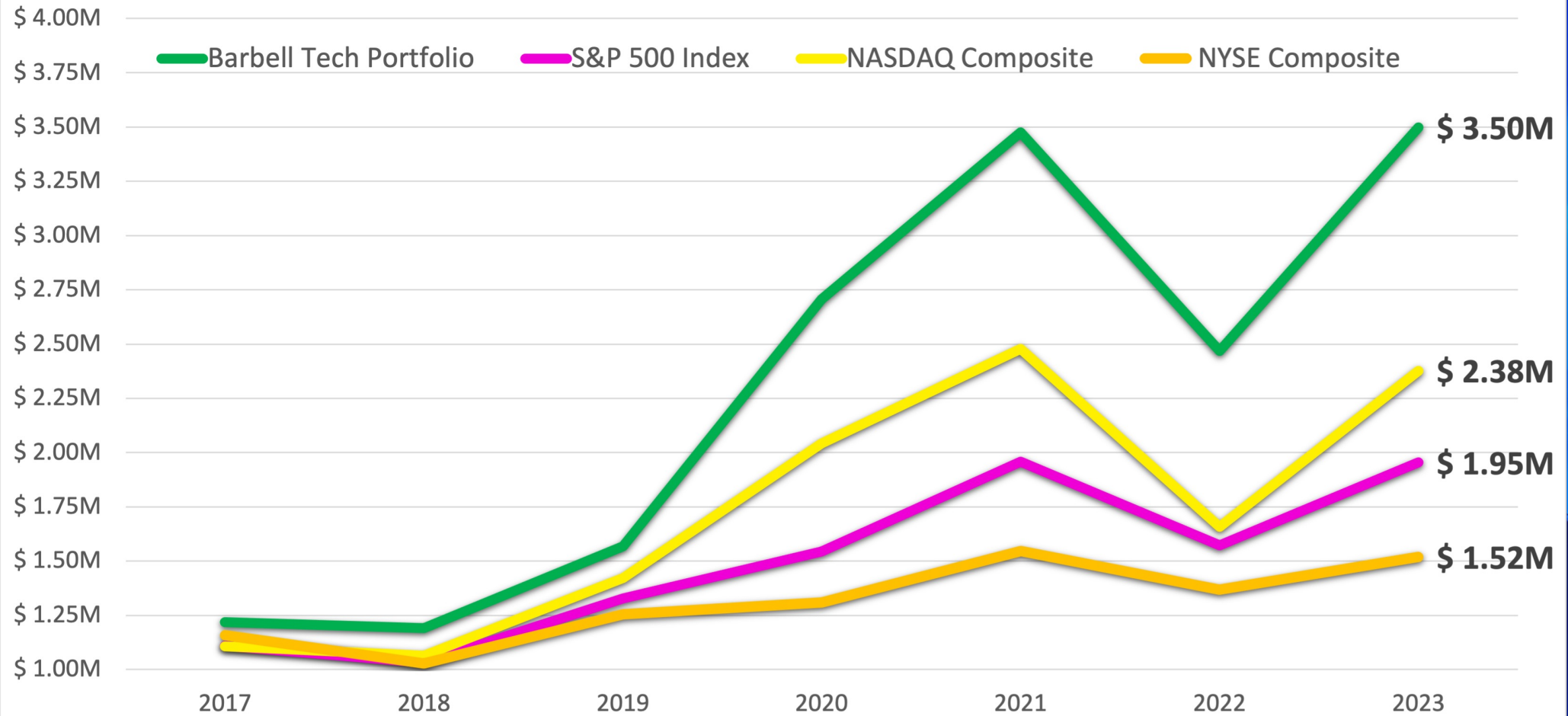
**Non-compounded returns

Portfolio Stats Summary	2024
Starting Portfolio Positions 2024	49
Portfolio Yield	0.71%
Portfolio Turnover	23.16%

DISCLOSURES: These summaries are gross of fees as every advisor may choose a different fee for their clientele. Any investor using these portfolios must also assume an additional cost will be added and net results will differ. Typically, that cost ranges from 0.75% to 1.75% depending on account size and the services rendered. Finally, these results cover periods when management researched the portfolio in-house only with a start date of June 1, 2017. It was offered for portfolio use as of 12/22/2017 to clients and other advisors for use with their clientele. It is highly likely that varying results were reached by outside parties where management was not in control of the trading or advisory service for a particular client. Past performance is never a guarantee of any future results. Please consult your advisor before making any investment decisions. Nothing in this material is intended to be investment advice. Reference to any specific security does not constitute an offer to buy or sell securities in any jurisdiction. All public data received from what are expected to be reliable sources. Truvestments Capital, LLC is not responsible for any damages or losses arising from any use of this information. Fee-based investment advisory services are offered through Truvestments Capital, LLC, a SEC-registered investment advisor. All data through DECEMBER 31, 2023. Copyright 2024. All Rights Reserved.



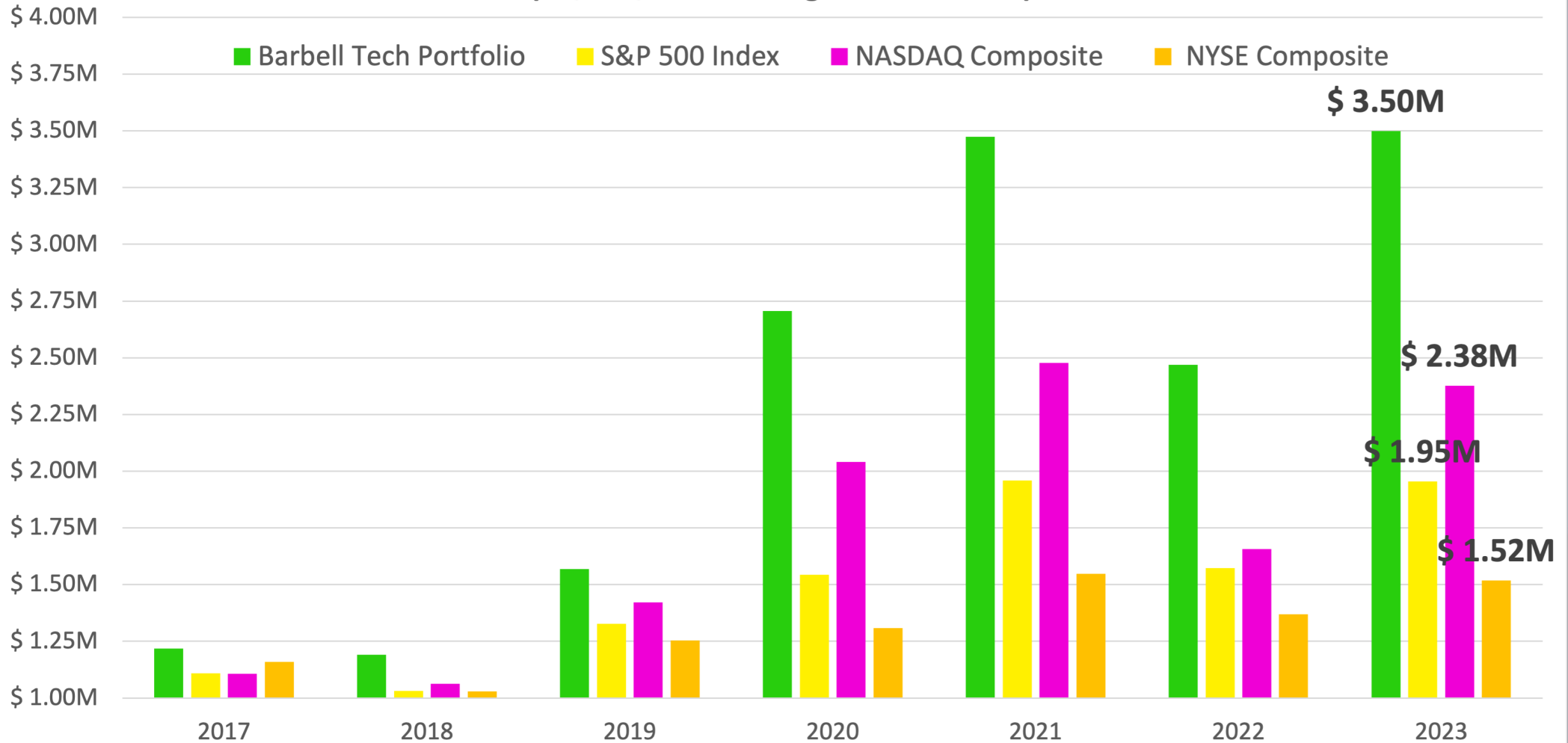
Barbell Tech Portfolio Comparison (\$1,000,000 Starting Value in 2016)



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TRUVESTMENTS

Barbell Tech Portfolio Comparison (\$1,000,000 Starting Value in 2016)



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TRUVESTMENTS

Barbell Economy Biotech Portfolio

Biotech is the chosen sector of the Baby Boomer end of the Barbell Economy, where data suggest powerful tech, medical and scientific forces are all converging to bring significant health benefits to all generations. The significance of those changes are set to be life-changing and can hold important value for the patient investor. Even so, it is vitally important that all investors using this particular portfolio understand that the volatility is surely higher than what many other portfolios have historically shown. This demands patience and discipline, along with a long-term horizon, permitting values to unfold over time while bringing life-changing treatments and services to patients needing such solutions around the world.

History and Statistics	2017*	2018	2019	2020	2021	2022	2023	Cumulative Results**
NYSE Composite Index	11.10	-11.20	21.88	4.40	18.17	-21.44	10.99	NYSE Composite Index 33.90
Barbell Biotech Portfolio	46.59	-2.55	25.11	23.86	3.47	-16.74	26.52	Barbell Biotech Portfolio 106.26
Barbell Net Difference (%)	35.49	8.65	3.23	19.46	-14.70	4.70	15.53	Barbell Net Difference (%) 72.36
S&P 500 Index	10.84	-6.94	28.71	16.26	26.85	-25.19	24.23	S&P 500 Index 74.76
Barbell Biotech Portfolio	46.59	-2.55	25.11	23.86	3.47	-16.74	26.52	Barbell Biotech Portfolio 106.26
Barbell Net Difference (%)	35.75	4.39	-3.6	7.60	-23.38	8.45	2.29	Barbell Net Difference (%) 31.50
NYSE Biotech Index IBB	8.28	-9.68	24.97	26.77	1.73	-23.27	3.76	NYSE Biotech Index IBB 32.56
Barbell Biotech Portfolio	46.59	-2.55	25.11	23.86	3.47	-16.74	26.52	Barbell Biotech Portfolio 106.26
Barbell Net Difference (%)	38.31	7.13	0.14	-2.91	1.74	6.53	22.76	Barbell Net Difference (%) 73.70

*Portfolio Beginning Date June 1, 2017

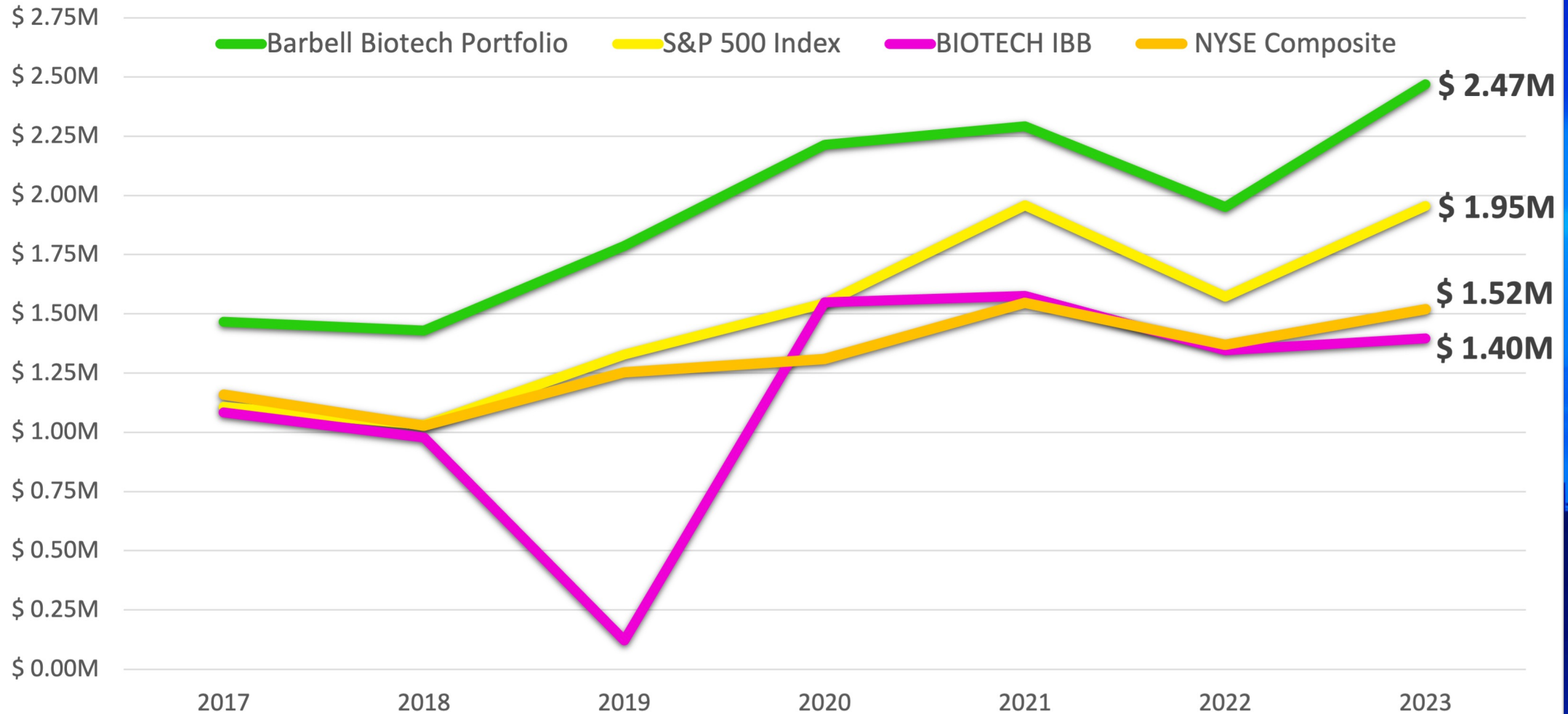
**Non-compound returns

Portfolio Stats Summary	2024
Starting Portfolio Positions***	46 of 50
All Biotech Sector Holdings	
Annual Portfolio Turnover	23.61%

***Implies current level of 8% in cash

DISCLOSURES: These summaries are gross of fees as every advisor may choose a different fee for their clientele. Any investor using these portfolios must also assume an additional cost will be added and net results will differ. Typically, that cost ranges from 0.75% to 1.75% depending on account size and the services rendered. Finally, these results cover periods when management posted the portfolio in-house only beginning June 1, 2017. It was offered for portfolio use as of 12/22/2017 to clients and other advisors for use with their clientele. It is highly likely that varying results were reached by outside parties where management was not in control of the trading or advisory service for a particular client. Past performance is never a guarantee of any future results. Please consult your advisor before making any investment decisions. Nothing in this material is intended to be investment advice. Reference to any specific security does not constitute an offer to buy or sell securities in any jurisdiction. All public data received from what are expected to be reliable sources. Truvestments Capital, LLC is not responsible for any damages or losses arising from any use of this information. Fee-based investment advisory services are offered through Truvestments Capital, LLC, a SEC-registered investment advisor. All data through DECEMBER 31, 2023. Copyright 2024. All Rights Reserved.

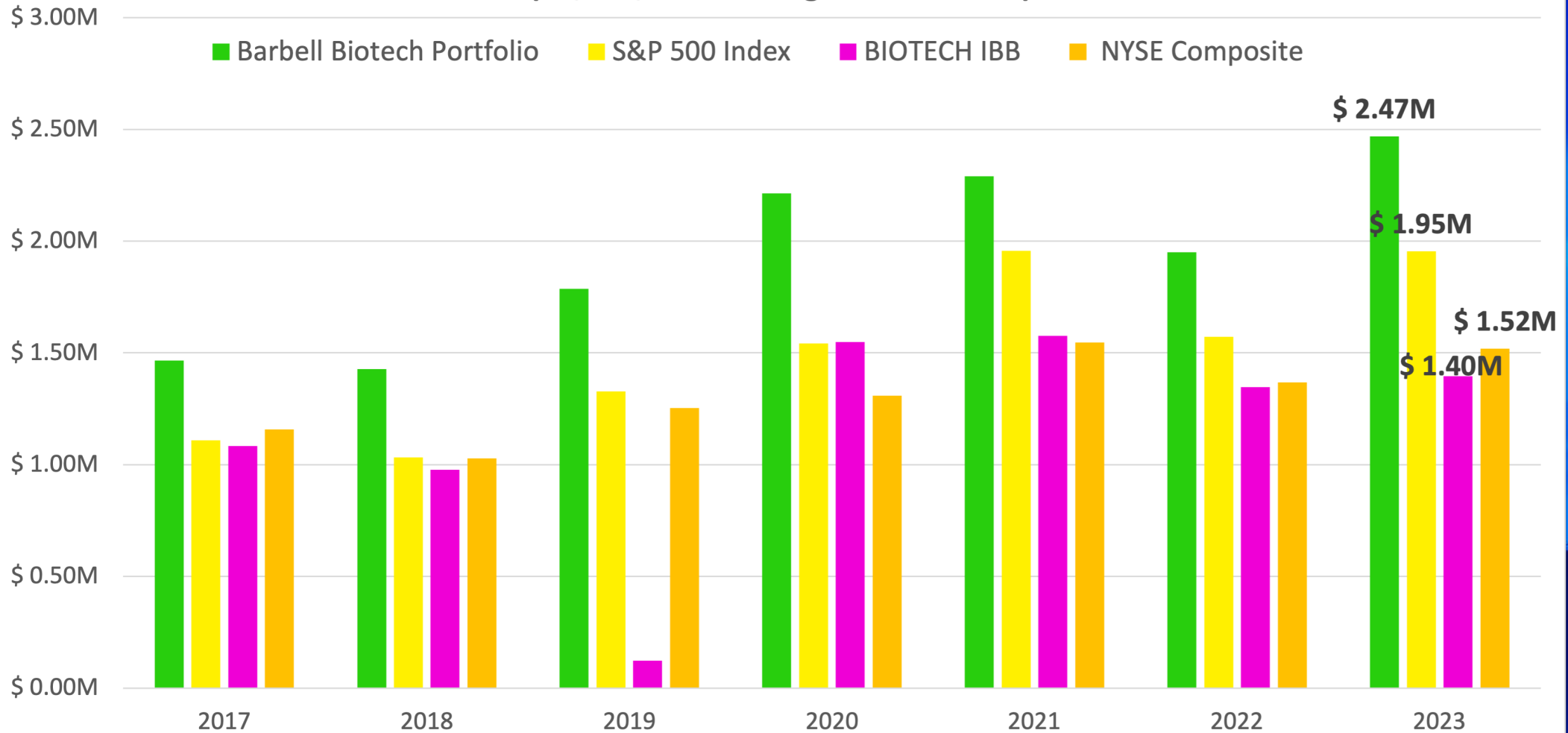
Barbell Biotech Portfolio Comparison (\$1,000,000 Starting Value in 2016)



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TRUVESTMENTS

Barbell Biotech Portfolio Comparison (\$1,000,000 Starting Value in 2016)



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TRUVESTMENTS

Barbell Economy Small Account Portfolio

The small account portfolio provides for a client response solution for accounts which stand at \$150,000 or lower (client choice). This portfolio still builds around the demand base of the Barbell Economy® and its expansion channels. The interest was to provide for multi-cap exposure for clients beginning with smaller balances. Generation Y is the most technologically advanced generation to ever inhabit the planet. The impact their technological prowess will have on our lives will redefine the word change. And when we say change – we mean change in ways that cannot be comprehended or defined effectively today. The issue? It is a bit more difficult to provide for a comparable index, so we have included a broad market index, a large cap index and a small cap index for transparency and full perspective.

History and Statistics	2019*	2020	2021	2022	2023	Cumulative Results**	
NYSE Composite Index	6.62	4.40	18.17	-11.53	10.99	NYSE Composite Index	28.65
Barbell Small Acct Portfolio	8.47	16.14	31.90	-7.06	19.42	Barbell Small Acct Portfolio	68.87
Barbell Net Difference (%)	1.85	11.74	13.73	4.47	8.43	Barbell Net Difference (%)	40.22
S&P 500 Equal-Weight RSP	8.30	10.21	24.25	-13.79	13.70	S&P 500 Equal-Weight RSP	52.67
Barbell Small Acct Portfolio	8.47	16.14	31.90	-7.06	19.42	Barbell Small Acct Portfolio	68.87
Barbell Net Difference (%)	0.17	5.93	7.65	6.73	5.72	Barbell Net Difference (%)	16.20
Russell 2000 Index (IWM)	7.31	20.08	14.29	-20.60	16.79	Russell 2000 Index (IWM)	37.87
Barbell Small Acct Portfolio	8.47	16.14	31.90	-7.06	19.42	Barbell Small Acct Portfolio	68.87
Barbell Net Difference (%)	1.16	-3.94	17.61	13.54	2.63	Barbell Net Difference (%)	31.00

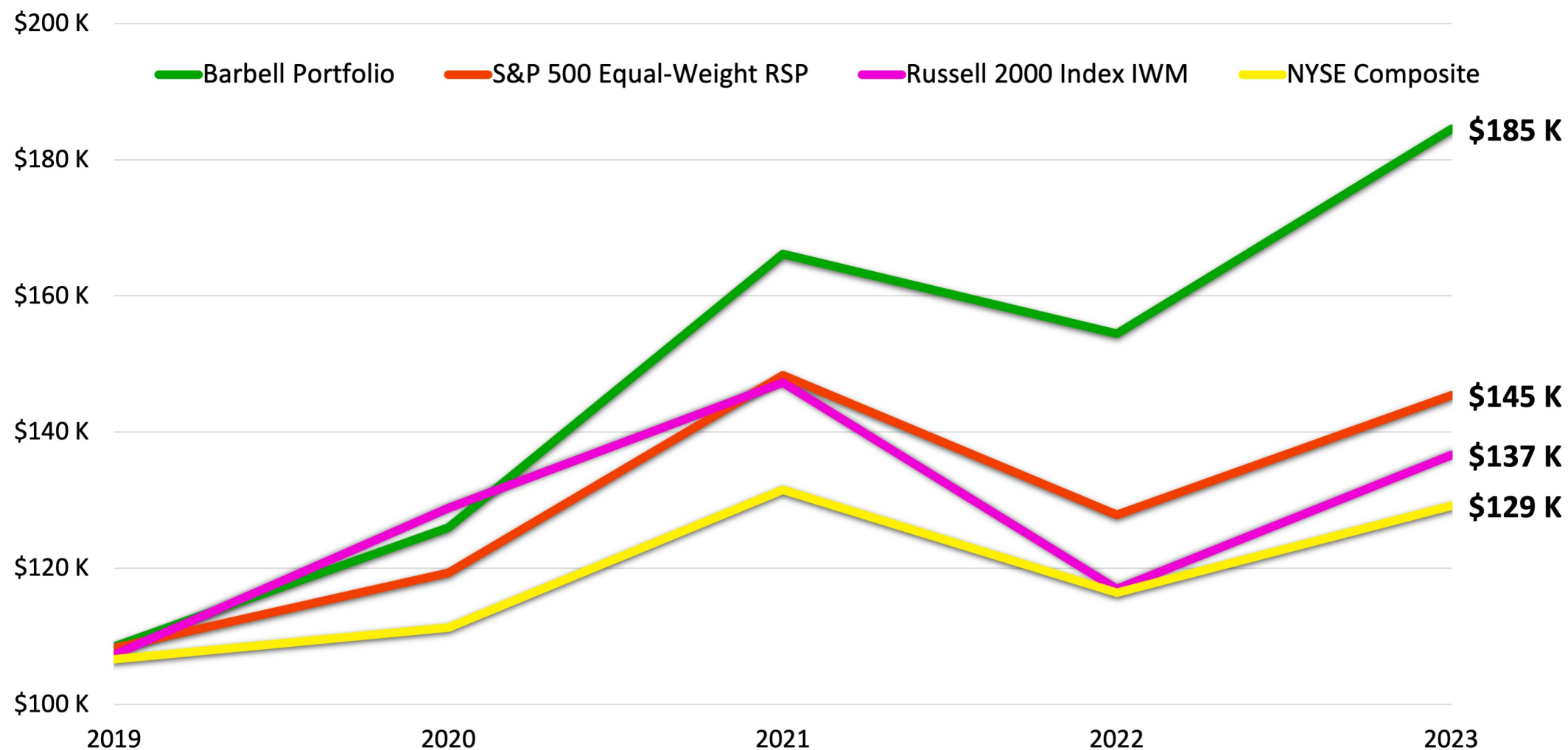
*Portfolio Beginning Date June 30, 2019

**Non-compounded returns

Portfolio Stats Summary	2024
Starting Portfolio Positions 2024	24
Portfolio Yield	0.61%
Portfolio Turnover	20.36%

DISCLOSURES: These summaries are gross of fees as every advisor may choose a different fee for their clientele. Any investor using these portfolios must also assume an additional cost will be added and net results will differ. Typically, that cost ranges from 0.75% to 1.75% depending on account size and the services rendered. Finally, these results cover periods when management researched the portfolio in-house only with a start date of June 1, 2017. It was offered for portfolio use as of 6/30/2019 to clients and other advisors for use with their clientele. It is highly likely that varying results were reached by outside parties where management was not in control of the trading or advisory service for a particular client. Past performance is never a guarantee of any future results. Please consult your advisor before making any investment decisions. Nothing in this material is intended to be investment advice. Reference to any specific security does not constitute an offer to buy or sell securities in any jurisdiction. All public data received from what are expected to be reliable sources. Truvestments Capital, LLC is not responsible for any damages or losses arising from any use of this information. Fee-based investment advisory services are offered through Truvestments Capital, LLC, a SEC-registered investment advisor. All data through DECEMBER 31, 2023. Copyright 2024. All Rights Reserved.

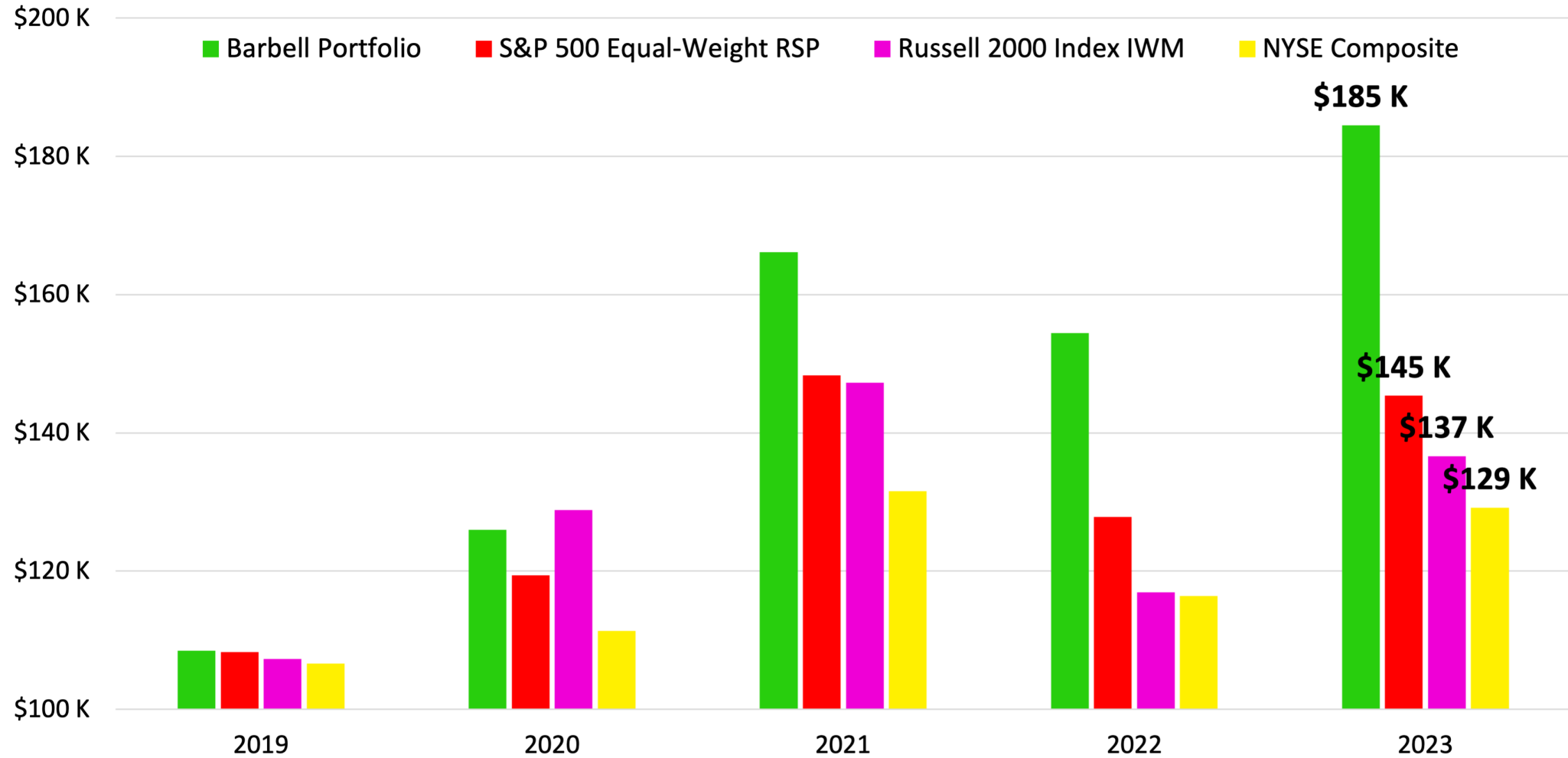
Barbell Economy Small Account Portfolio Comparison (\$100,000 Starting Value in 2019)



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Barbell Economy Small Account Portfolio Comparison (\$100,000 Starting Value in 2019)

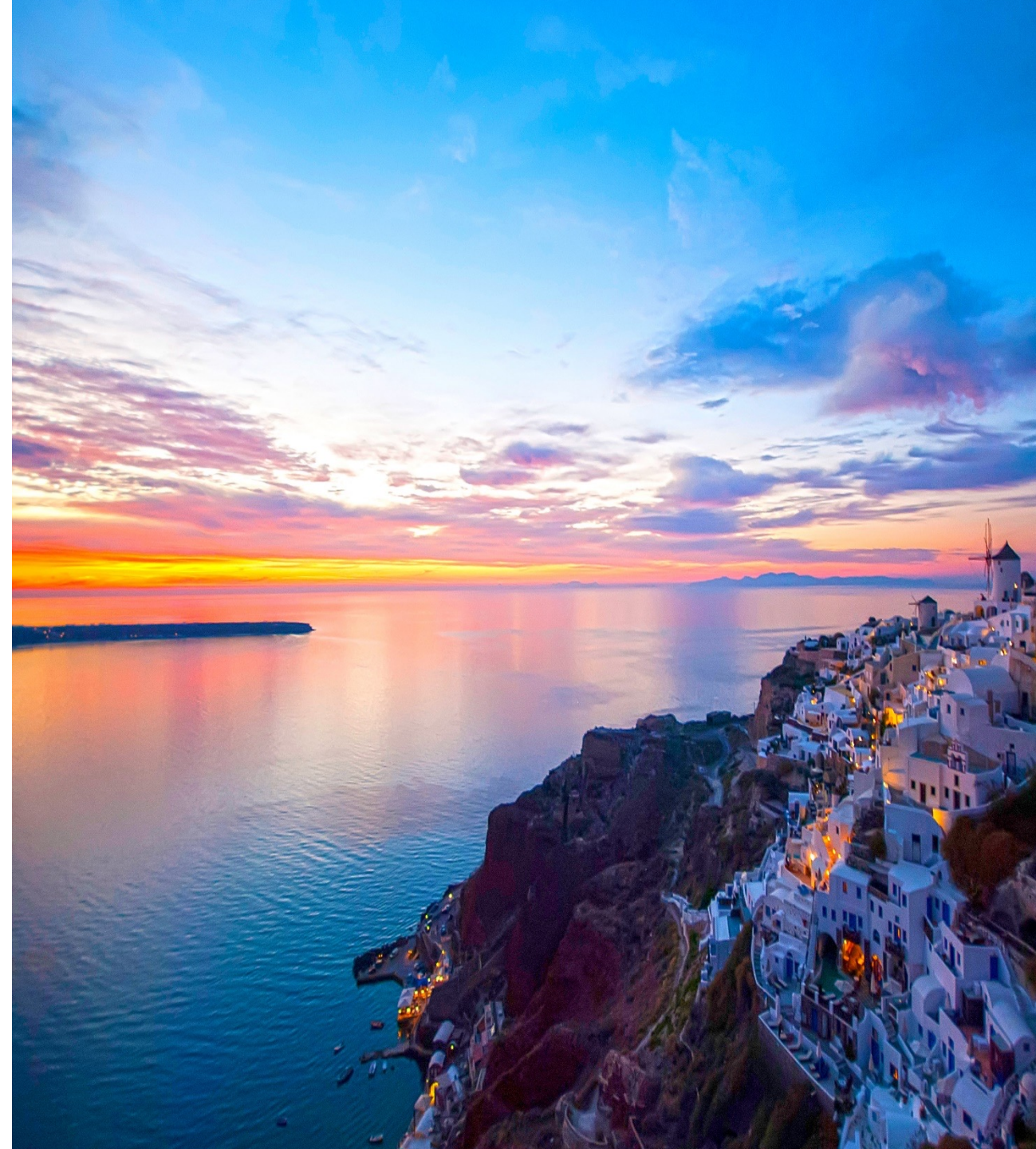


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Your Next Best Steps...

- Let's Review Your Plan – Our *Second Opinion Service* has proven its value
- Let's Make Sure You're Positioned To *Benefit* From *Demogronomics®*
- Let's *Simplify* Your Wealth, Estate & Compound Income Growth Strategies, Tax-Free when possible
- Let's Make Sure You Enjoy What *Matters Most*





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