



The Approach

A diversified approach to investing that provides access to multiple asset classes, industry sectors and geographic regions. The portfolio is comprised of exchange-traded funds (ETFs), mutual funds and individual securities. The portfolio uses a combination of fundamental and quantitative models to assess relative value across global asset classes. Global tactical asset allocation (GTAA) portfolios are designed to allow investors the flexibility to allocate investment capital towards the markets that offer the highest risk-adjusted returns. In contrast to static blend portfolios (e.g., 60% equity / 40% debt), GTAA portfolios are managed so that more attractive asset classes are over-weighted and less attractive asset classes are under-weighted.

The Features

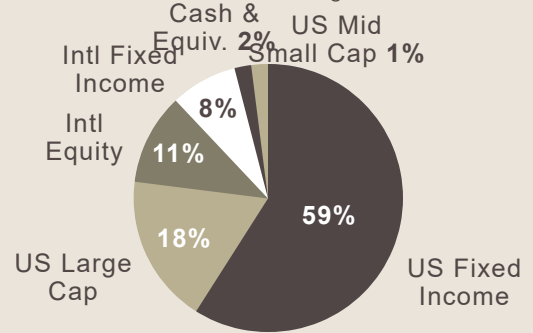
A globally-diversified portfolio that seeks to deliver superior risk-adjusted returns over the index through the implementation of GTAA. The investment objective of the portfolio is total return. The portfolio is unconstrained in asset allocation and security selection but typically targets a 30/60/10 equity/fixed income/alternative portfolio weighting. The primary asset classes utilized are: global equities; global fixed income; global real estate; commodities; real assets; alternative strategies (e.g., managed futures); and inflation-linked bonds. Within each of these principal categories are numerous subcategories.

Key Facts

- Assets Managed — \$60 Million
- Holdings — 20
- Min Portfolio Size - \$25,000

Allocation

May not sum to 100 due to rounding.



Top 5 Holdings (% weight)

iShares Total US Stock ETF	15.2%
Goldman Sachs Core Bond Fund	10.2%
JP Morgan Core Plus Bond ETF	10.2%
River Canyon Total Return Bond	8.5%
BlackRock Total Return Bond Fund	8.5%

Source: Addepar as of Mar. 2024

E / contact@6meridian.com • P / 316.776.4601 / 855.334.2110 • F / 316.776.4620

WWW.6MERIDIAN.COM • 8301 E. 21st Street N. Ste. 150, Wichita, KS 67206

6 Meridian is a group comprised of investment professionals registered with Hightower Advisors, LLC, a SEC-registered investment adviser. Some investment professionals may also be registered with Hightower Securities, LLC, member FINRA and SIPC. Advisory services are offered through Hightower Advisors, LLC. Securities are offered through Hightower Securities, LLC. This is not an offer to buy or sell securities. No investment process is free of risk, and there is no guarantee that the investment process or the investment opportunities referenced herein will be profitable. Past performance is neither indicative nor a guarantee of future results. The investment opportunities referenced herein may not be suitable for all investors. All data or other information referenced herein is from sources believed to be reliable. Any opinions, news, research, analyses, prices, or other data or information contained in this presentation is provided as general market commentary and does not constitute investment advice. 6 Meridian and Hightower Advisors, LLC or any of its affiliates make no representations or warranties express or implied as to the accuracy or completeness of the information or for statements or errors or omissions, or results obtained from the use of this information. 6 Meridian and Hightower Advisors, LLC assume no liability for any action made or taken in reliance on or relating in any way to this information. The information is provided as of the date referenced in the document. Such data and other information are subject to change without notice. This document was created for informational purposes only; the opinions expressed herein are solely those of the author(s) and do not represent those of Hightower Advisors, LLC, or any of its affiliates.

Hightower Advisors, LLC or any of its affiliates do not provide tax or legal advice. This material is not intended or written to provide and should not be relied upon or used as a substitute for tax or legal advice. Information contained herein does not consider an individual's or entity's specific circumstances or applicable governing law, which may vary from jurisdiction to jurisdiction and be subject to change. Clients are urged to consult their tax or legal advisor for related questions.