

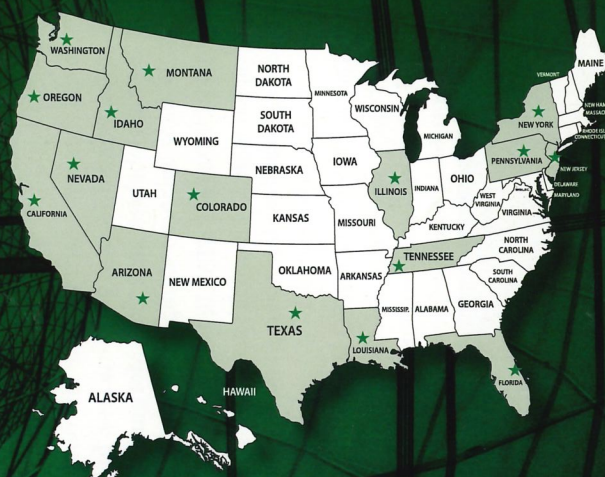
Why Use Winans Investments as Your Money Manager?

- ▶ Verified Investment Performance in Bull & Bear Markets
- ▶ Long History of Consistent & Timely Market Forecasts
- ▶ Balance of Technical Trading & Fundamental Investing
- ▶ In-House Investing: Expertise in U.S. Stocks, Corporate Bonds, and Preferreds
- ▶ Customized, Separate Managed Portfolios for Tax Efficiency
- ▶ Transparent, Competitive Fees, No Exit Penalties

“Winans Investments is one advisor who is always looking ahead.”

*Tom Nally, President
TD Ameritrade Institutional*

Serving Our Growing Clientele — Coast to Coast



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WINANS INVESTMENTS
Effectively Using Financial History Since 1992!



Winans Investments

**“Effectively Applying
Financial History
Since 1992”**



Who is Winans Investments?

- ▶ Independent Registered Investment Advisor Since 1992
- ▶ Veteran Team With over 100 Cumulative Years of Investment Expertise
- ▶ Portfolio Manager With Proprietary Investment Strategy
- ▶ Integrated Historical Research in Stocks, Bonds, and Real Estate Analysis
- ▶ A Fiduciary With Client Assets Held at TD Ameritrade or Charles Schwab

**“Winans Provides
Excellent Research!”**

*Matt Krantz,
Financial Markets Reporter
USA Today*

“Time-Tested Team To Serve Your Individual Financial Needs!”



PERFORMANCE: With documented performance records since 2003, Winans Investments (WI) manages equity and fixed income investments for its growing clientele and has won international acclaim for its success. In 2019, WI received the highest performance rating given by the global research firm, Morningstar™ for the 3 and 5 year investment performance of the “Winans Balanced Composite”.

INVESTMENT STYLE: With the goal of reducing investment volatility while still achieving capital appreciation, WI’s active management approach marries the benefits of technical analysis for tactical decision making and fundamental studies to identify the best individual companies to own as investments.

IN-HOUSE PORTFOLIO MANAGEMENT: WI’s proprietary research and portfolio management systems reduces the need for expensive outside vendors or investment products. WI offers its clients customized portfolios in a cost-effective way.

*Please see enclosed insert for applicable disclosures

“Staying 100% invested in the market 100% of the time is insane.” Winans says adamantly.”

TD Ameritrade’s “Advisor Solutions” magazine, 2017

Proprietary Financial Research

As a capital management & research firm, Winans Investments has documented “track records” in both market forecasting and portfolio management. In fact, its proprietary research has led to a long record of financial forecasts since 1992.

INVENTIONS: WI developed several investment indexes (common equities, preferred stocks and housing) and a stock market trend indicator. These tools provide WI with useful insights into the financial trends of the last 100 years that do reoccur in present day. These indices are also used by major financial and academic institutions on a subscription basis through Global Financial Data, MetaStock or SRC Research.

PUBLISHED RESEARCH: Ken Winans has written and published four acclaimed investment books. In 2018, he was granted a world record for the most honors won in major international book competitions for a finance/business author. Printed and eBook copies of these books can be purchased at www.Amazon.com

Forbes Articles: Since 1998, WI’s research has been used in articles by leading media websites. Follow Ken Winans’ investing articles at Forbes.com

*Please see enclosed insert for applicable disclosures



Winans

Verified Performance, Professional Customer Service!

If you are looking for investment performance, contact Winans Investments!

Serving clients nationwide for over 25 years by offering effective investment solutions over a wide range of investment choices.

WI’s portfolios are also available to financial planners and wealth managers through TD Ameritrade’s, Managed Account Solutions program.

For a free Portfolio Evaluation or Financial Consultation, please contact us

WWW.WinansInvestments.com or 800-4WINANS

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