



NEW SQUARE  
CAPITAL

# FIXED INCOME PORTFOLIOS

*Investment income with meaningful preservation*

You need investments that help preserve your principal, but you need income too. NewSquare Capital has built a fixed income team with the experience and skill to do both.

**The result: NewSquare Fixed Income Portfolios.**

## INDIVIDUAL TAXABLE BOND PORTFOLIOS

are designed to pursue attractive income consistent with prudent risk management.

## INDIVIDUAL TAX-EXEMPT BOND PORTFOLIOS

may provide an attractive level of income from tax-advantaged securities.

## ENHANCED CASH MANAGEMENT PORTFOLIOS

seek to provide income as an alternative to low-yielding cash options.

## A DIFFERENTIATED APPROACH THAT SEEKS TO ACHIEVE BETTER RESULTS

NewSquare believes that a different approach is needed to help investors achieve better outcomes. So our team has developed strategies that can enhance investor income while still prioritizing principal preservation:



### RESEARCH

We research each security – from multiple points of view – to help ensure we are making a good loan to a qualified issuer.



### EVALUATE

We evaluate market supply and demand trends to help us identify securities that may offer better- than- expected income or value.



### DISCIPLINE

We use a disciplined investment process with an emphasis on risk management and liquidity.

## HOW CAN NEWSQUARE'S FIXED INCOME PORTFOLIOS BENEFIT YOU?



### We seek to provide consistent payouts to meet your income targets

By looking at your entire financial picture, we'll provide an income strategy that aims to meet your cash needs and investment objectives.



### Conservative approach

You don't need surprises, so we consistently assess risks and take proactive steps to preserve your principal.



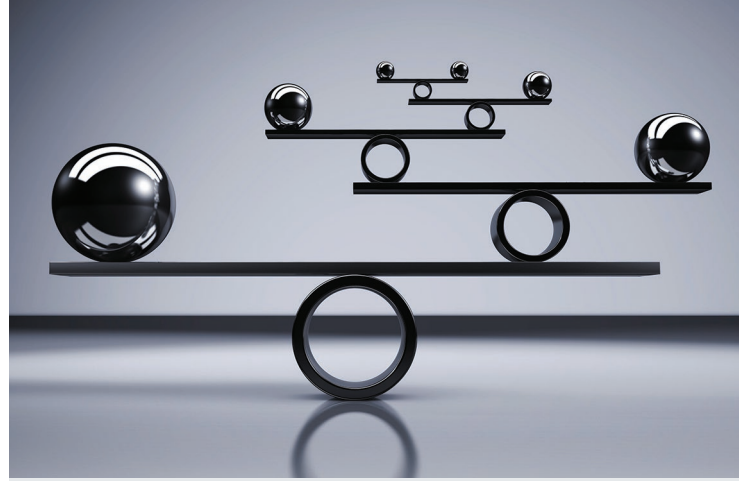
### A precise eye for finding value

Our diligent management allows us to evaluate demand trends and find quality investment opportunities at good value.



### Significant fixed income experience

You have access to an experienced team with a deep understanding of investor needs, enhanced by NewSquare's disciplined approach to pursuing better investment outcomes.



*Our approach starts with investors' goals: Capital preservation and steady income streams – consistently.*

*– Miguel Biamon, Senior Fixed Income Portfolio Manager*

## A NEWSQUARE APPROACH TO FIXED INCOME

NewSquare's fixed income team reflects the core values of NewSquare: a deep understanding of market dynamics, dedicated discipline, and a focus on creating better outcomes for investors. NewSquare seeks to provide the combination of consistent income and risk management from your fixed income investments.

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