

INCOME STRATEGIES

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 help you do both.

The result: NewSquare Fixed Income Portfolios.

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 bond issuer from multiple points of view to help ensure we are selecting issuers with a history of meeting their debt obligations.

**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.

**▶ 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.

How can NewSquare's Fixed Income Portfolios benefit you?



WE SEEK TO PROVIDE CONSISTENT PAYOUTS TO HELP MEET YOUR INCOME TARGETS

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



CONSERVATIVE APPROACH

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



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.



A PRECISE EYE FOR FINDING VALUE

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



“Our approach starts with investors’ goals: Capital preservation and steady income streams – consistently.”

— MIGUEL BIAMON, SENIOR FIXED INCOME PORTFOLIO MANAGER

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