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GROWTH STRATEGIES

Dividend Focus Portfolio

Income with capital appreciation potential.

The income needs from your portfolio are the priority, but you would like to grow principal over time. NewSquare Capital has built a team with the experience and skill to pursue both.

The result: NewSquare Dividend Focus Portfolio.

Strategy Highlights

THE INCOME PLAN

A regular income stream is a key part of many investors' financial plan.

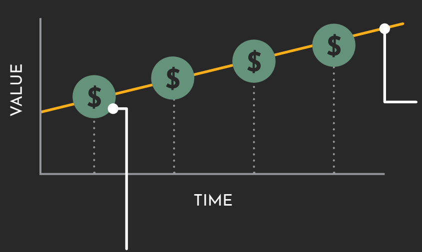
THE INCOME DILEMMA

Dividend-paying stocks offer advantages over fixed income securities, including **an income stream** in addition to **potential capital appreciation.**

NEWSQUARE'S APPROACH

A high-yielding-dividend stock portfolio that seeks an **above-market income stream while maintaining equity exposure.**

THE TOTAL RETURN ON AN INVESTMENT HAS TWO COMPONENTS:



STOCK APPRECIATION

The increase in stock price over the holding period

This is typically the one investors focus on

DIVIDEND

The dividends paid to share-holders during the holding period

Often overlooked but can be a significant contributor to total return

Example provided for illustrative purposes only. Dividends are not guaranteed. There are no guarantees that dividend-paying stocks will continue to pay dividends.

DISCIPLINE

We use a disciplined investment research process that places an emphasis on risk management and seeks a margin of safety on the income stream.

RESEARCH

We research each security from both a fundamental and technical point of view to assess the stability of the dividend and the potential for appreciation.

EVALUATION

We evaluate our holdings over a long time period and make adjustments as yields and valuations warrant.

How can NewSquare's Dividend Focus Portfolio benefit you?

STEADY PURSUIT

We work diligently to seek above-market dividends yields to help meet your income targets.

A RISK-AWARE INVESTMENT PROCESS

Risk is managed through diversification and a focus on cash flow and balance sheet strength.

BALANCED APPROACH

Our investment approach balances the yield characteristics of an investment with the potential for appreciation in the stock price.

SIGNIFICANT EQUITY RESEARCH 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.

"Many investors fail to focus on the total return of an investment. At NewSquare, we find that when we bring dividends into the picture, it can change the conversation."

—LEE S. GROUT, CFA, SENIOR PORTFOLIO MANAGER

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