

INCOME STRATEGIES

Fixed Income Portfolios

**Income-focused investing with an
emphasis on risk management**

You seek approaches that help preserve your principal, and you may also need income, now or later. NewSquare Capital has built a fixed income team with the experience and skill to help you achieve both.

The result: NewSquare Fixed Income Portfolios

A differentiated approach focused on income generation and risk management.

NewSquare believes that a different approach is needed to help investors pursue better outcomes. So our team has developed **strategies designed to address investor income and capital preservation objectives:**

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 CONSTRUCT PORTFOLIOS DESIGNED TO HELP PROVIDE THE INCOME YOU NEED

With you and your advisor, we design portfolios tailored to your specific needs.



CONSERVATIVE APPROACH

You don't need surprises, so we consistently assess risks and adjust holdings based on market conditions and client objectives.



SIGNIFICANT FIXED INCOME EXPERIENCE

You have access to an experienced team with a deep understanding of investor needs, supported by NewSquare's disciplined investment approach and risk management process.



A PRECISE EYE FOR FINDING VALUE

Our diligent investment process allows us to evaluate market 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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