

INCOME STRATEGIES

Fixed Income ETF Portfolios

Fixed income can play a fundamental role in your investment portfolio. We offer Exchange Traded Fund (ETF) strategies that **provide liquidity, diversification across sectors, and income-focused objectives.**

An approach that targets monthly income objectives as an alternative to fixed-maturity bonds.

RESEARCH

Identify high-quality ETFs through rigorous analysis of underlying exposures, liquidity, expenses and management.

ALLOCATE

Build diversified portfolios by strategically allocating across fixed-income sectors and exposures.

MANAGE

Monitor market conditions and portfolio positioning, making adjustments as opportunities and risks evolve.

**ETF TAXABLE
BOND PORTFOLIOS**

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

**ETF TAX-EXEMPT
BOND PORTFOLIOS**

seek to provide an attractive level of income from tax-exempt securities.

How can NewSquare's fixed income ETF strategies benefit you?



WE SEEK TO GENERATE INCOME THROUGH ACTIVE FIXED-INCOME ALLOCATION

Income-focused strategies can be incorporated into an overall investment plan designed to align with an investor's objectives and risk tolerance.



DISCIPLINED RISK MANAGEMENT

We strategically adjust exposure as market conditions warrant.



SIGNIFICANT FIXED INCOME EXPERIENCE

Our experienced, investor-focused team is committed to a sound and disciplined investment process.



A STRATEGIC APPROACH TO FINDING VALUE

Our disciplined approach is designed to evaluate investment opportunities.



“We align our approach with investors’ objectives, seeking income opportunities while maintaining a disciplined focus on liquidity and risk management.”

— MIGUEL BIAMON, SENIOR FIXED INCOME PORTFOLIO MANAGER

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Investing in any investment vehicle carries risk, including possible loss of principal, and there can be no assurance that any investment strategy will provide positive performance over a period of time. The asset classes and/or investment strategies described in this publication may not be suitable for all investors. There are no guarantees that Fixed Income ETFs will continue to pay interest. Diversification does not assure a profit or protect against loss. Risk management does not imply low- or no-risk. Fixed Income ETFs will decrease in value as interest rates rise. Investment return and principal value will fluctuate so that an investor's shares, when sold or redeemed, may be worth more or less than the original cost and potentially subject to capital gains taxes. Tax-exempt fixed income strategies invest in securities designed to pay income that is exempt from certain income taxes, but a portion of the income may be subject to federal or state income taxes or the alternative minimum tax. Federal or state changes in income or alternative minimum tax rates or in the tax treatment of municipal bonds may make them less attractive as investments and cause them to lose value.

Exchange traded funds (ETFs) are subject to market volatility and the risks of their underlying securities. ETFs are subject to management fees and other expenses. Unlike mutual funds, ETF shares are bought and sold at market prices, which may be higher or lower than the amount invested.

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