



CONSTITUTION WEALTH

SEPARATELY MANAGED ACCOUNTS

CUSTOM PORTFOLIOS... FOR THOSE WHO WANT THEIR COUNTRY BACK



THE PROBLEM

The increased use of mutual funds and ETF's by wealth managers in recent years has resulted in the consolidation of control over America's Corporations by a small handful of asset managers. This has been the catalyst for Corporations increasingly engaging in political and social policy - *policy that is frequently at odds with the Conservative American values of clients.*

How do these asset managers influence corporate social & political behavior? By leveraging the voting power of shares held in the investment funds used by investors.

% OF TOTAL OUTSTANDING US EQUITIES HELD BY INSTITUTIONAL INVESTORS

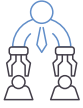


*Source: Bromilow, Catherine et al. "The Changing Face of Shareholder Activism." The Harvard Law School Forum on Corporate Governance, 1 Feb. 2018, corpgov.law.harvard.edu/2018/02/01/the-changing-face-of-shareholder-activism/

gb AS MENTIONED ON THE
GLENN BECK SHOW

THE SOLUTION: SEPARATELY MANAGED ACCOUNTS BY CONSTITUTION WEALTH

We believe that American Corporations should be owned and controlled by American investors, not asset managers. Our approach involves:



DISINTERMEDIATION

Investment funds insert a legal entity between investor and investment that results in the separation of ownership from control. Disintermediation is the removal of these entities by purchasing equities directly in your client's account.



PORTFOLIO CONSTRUCTION

Our unique approach to building values-based portfolios involves making distinctions based on where in a company's income statement your client's values are being violated. Is it on the revenue side (company sells a product that is in violation) or an expense (company donates to causes that are a violation)? If a violation is in the company's expenses, factors such as "controlled company" status* and disparate voting rights among share classes are analyzed to determine if becoming a shareholder gives the client an opportunity to promote change at the company.



ACTIVE OWNERSHIP

Among the most important elections in America are those for the Board of Directors of major corporations. By using stocks, instead of funds, your clients retain a vote in these elections.

Unfortunately, most wealth advisors do not provide proxy voting services for their clients. Constitution Wealth handles the proxy voting in our SMAs and provides you with an annual Ownership report summarizing how your clients' shares were voted. Giving you, the advisor, an opportunity to demonstrate additional value-add.

DID YOU KNOW?

71% of all shares held in retail accounts were not voted in 2022. **Don't let your client's voice go unheard!**


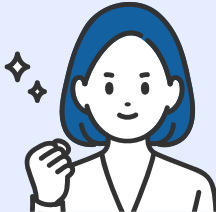
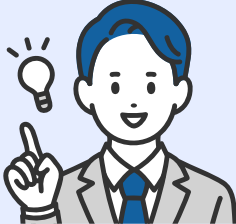
*Source: ProxyPulse: 2023 Proxy Season Preview and 2022 Proxy Season Highlights." Broadridge ProxyPulse, Broadridge Financial Solutions, Inc., www.broadridge.com/_assets/pdf/broadridge-2023-proxypulse-report.pdf. Accessed 17 Nov. 2023.

SEPARATELY MANAGED ACCOUNTS: OWNERSHIP. CUSTOMIZED.

	SMA's	EFTs	MUTUAL FUNDS
PORTFOLIO DIVERSIFICATION	✓	✓	✓
PROFESSIONAL MANAGEMENT	✓	✓	✓
TAX EFFICIENCY	✓	✓	
DIRECT OWNERSHIP	✓		
INCORPORATE CLIENT SPECIFIC VALUES	✓		
RETAIN CONTROL OF PROXY VOTES	✓		

EXAMPLE CLIENT PROFILES

These are not actual Constitution Wealth clients. For illustrative purposes only

CLIENT A	CLIENT B	CLIENT C
CHRISTIAN COUPLE (HIGH INCOME)	PRO-LIFE ADVOCATE	CONSERVATIVE SMALL BUSINESS OWNER
VALUES They do not want to own companies that violate their Christian faith.	VALUES Wants to exclude companies involved in the abortion industry but willing to invest in some companies that might violate other beliefs, but only if her investment can be used to promote change at the company.	VALUES Doesn't like companies de-banking and silencing conservatives but doesn't want to limit his investment opportunities. Likes the idea of being able to use his investments in companies to promote his conservative values.
SMA <input checked="" type="checkbox"/>	SMA <input checked="" type="checkbox"/>	SMA <input checked="" type="checkbox"/>
VALUES SCREENS Exclusions: <ul style="list-style-type: none"> • Abortifacient Manufactures • Contraceptive producers & distributors • Stem Cell Research • Involved in Gambling • Tobacco producers & suppliers 	VALUES SCREENS Exclusions: <ul style="list-style-type: none"> • Abortifacient Manufactures • Contraceptive producers & distributors • Stem Cell Research 	VALUES SCREENS Exclusions: <ul style="list-style-type: none"> • None
CONTROLLED COMPANIES/ NON-VOTING SHARES CLASSES Include	CONTROLLED COMPANIES/ NON-VOTING SHARES CLASSES Exclude	CONTROLLED COMPANIES/ NON-VOTING SHARES CLASSES Include
WANTS ACTIVE OWNERSHIP (PROXY VOTING) <input checked="" type="checkbox"/>	WANTS ACTIVE OWNERSHIP (PROXY VOTING) <input checked="" type="checkbox"/>	WANTS ACTIVE OWNERSHIP (PROXY VOTING) <input checked="" type="checkbox"/>
		



TRANSITION AND IMPLEMENT CLIENT ACCOUNTS SEAMLESSLY & EFFICIENTLY

- // Wash Sale Minimization
- // Transition timeline driven by tax/capital gain budget determined by you
- // Year-round Tax Loss Harvesting
- // Tax sensitive turnover



WHY CONSTITUTION WEALTH?

There are an abundance of wealth management firms in the world, but they often don't operate off of mutual company and client values. Constitution Wealth was created to find an intersection between finances and beliefs. We believe that when someone invests in their passions, their financial benefits will exponentially increase. There are ways to invest and give to companies and institutions that align with your patriotic, conservative ideals, and we're here to help you achieve that. We have created a wealth management firm that gives American patriots the guidance needed to build financial portfolios based on their passions, making investments they're proud of to strengthen their financial future.

READY TO EMPOWER YOUR CONSERVATIVE, FREEDOM LOVING CLIENTS?

EMAIL US AT INFO@CONSTITUTIONWEALTH.COM



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RISK CONSIDERATIONS: All investments are subject to risks, including the possible loss of principal. SMAs investing in non-U.S. issues will gain exposure primarily through investments in American Depository Receipts (ADRs). International investments can be riskier than U.S. investments due to the adverse effects of currency exchange rates; differences in market structure and liquidity; as well as specific country, regional, and economic developments. A growth or value approach to investing could cause underperformance as compared to other stock portfolios that employ different investment styles.

Values screen data and descriptions are obtained from MSCI Inc. (formerly ISS/Risk Metrics). MSCI Inc. and Constitution Wealth LLC are not affiliated.
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