

LVZ Faith Based Portfolio

The Lorence & Vander Zwart Faith Based Portfolio utilizes asset allocation strategies to create portfolios that are comprised of morally based investments.

Morally directed investing is the ability to represent your values in your investment portfolio. These portfolios can provide you with a solution that is more in line with your values.



LVZ Faith Based Portfolio:

- Professional portfolio management
- Multiple Fund Families
- Avoids Pornography, Abortion, and Promotion of Alternative Lifestyles
- Portfolio strategies ranging from Aggressive Growth to Pure Income
- \$25,000 Account minimum



Lorence & Vander Zwart is a Registered Investment Advisor

The portfolio strategies discussed here are designed to rotate in and out of various securities. It is possible that trading activity could result in a taxable event to the investor and result in an indirect cost to the investor. Diversification neither ensures a profit nor protects against market losses. Past performance is not indicative of future results.

An investment in a portfolio strategy is subject to investment risk, including possible loss of principal. The investment strategy of the funds used may include investments in foreign securities, small and medium sized companies, as well as funds that concentrate in one specific sector of the market, all of which may increase the risk and volatility of the funds. Bond fund shares are not guaranteed and will fluctuate with market conditions and interest rates, and redemption value may be more or less than original cost; and fixed income funds may be subject to a loss in value due to interest rate fluctuations. Sector funds employ leveraged investment techniques that magnify gains or losses. Indexes are unmanaged, do not incur management fees, costs and expenses, and cannot be invested in directly. Investment return and principal value will vary, so that investor's shares, when redeemed, may be worth more or less than their original cost.

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The Firm's Form ADV Part II is available upon request.
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