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H&A Investment Strategies: Equity Plus

The H&A Equity Plus Investment Strategy seeks capital appreciation via investing primarily within a portfolio of stocks. Under normal circumstances, a small amount of bonds and/or cash are held as a diversifier. The Equity Plus Strategy has a total return growth objective.

- The primary goal of the strategy is capital appreciation and real growth of assets. A substantial majority of the strategy is invested in stocks.
- Target allocation is 85% stocks /15% bonds + cash. The targeted equity allocation range is 75% - 90%.
- The stock component delivers capital appreciation, with a secondary focus on current income via dividends. Stocks are diversified across U.S. large, mid and small cap securities, as well as internationally across both developed and developing regions.
- The bond component is intended to deliver stability and diversification, and current income via regular interest payments from underlying bonds. The bond allocation may include a strategic component designed to reduce portfolio duration in a rising interest rate environment.
- Both the stock and bond components are managed with a total return objective.
- This strategy is designed for the growth investor with a long term (greater than five years) investment horizon.
- This strategy may be suitable for the growth investor seeking to grow assets and create wealth over a long investment horizon.