

LifePro Asset Management

Performance Comparison

LPAM TACTICAL OPPORTUNITY PORTFOLIO VERSUS THE COMPETITION

Ready to take the next step?

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Morningstar's Top Solid Large Growth Leaders

1 Year Return

Fund Name	Date	Category	1 Year Return
LPAM Tactical Opportunity	03-17-21	Large Growth	154.18%
Fidelity Advisor® Series Growth	03-17-21	Large Growth	125.27%
Fidelity® Series Growth Company	03-17-21	Large Growth	117.89%
Transamerica Large Growth R4	03-17-21	Large Growth	115.70%
Fidelity® Blue Chip Growth	03-17-21	Large Growth	114.62%
PGIM Jennison Focused Growth Z	03-17-21	Large Growth	105.79%
Alger Large Cap Growth I-2	03-17-21	Large Growth	101.51%
Vanguard US Growth Investor	03-17-21	Large Growth	95.10%
JHFunds2 Capital Appreciation	03-17-21	Large Growth	90.68%

2020 Return

Fund Name	Date	Category	2020 Return
LPAM Tactical Opportunity	12-31-20	Large Growth	101.05%
Transamerica Large Growth R4	12-31-20	Large Growth	72.99%
Fidelity® Series Growth Company	12-31-20	Large Growth	69.74%
Fidelity Advisor® Series Growth	12-31-20	Large Growth	68.10%
PGIM Jennison Focused Growth Z	12-31-20	Large Growth	67.36%
Alger Large Cap Growth I-2	12-31-20	Large Growth	67.03%
Fidelity® Blue Chip Growth	12-31-20	Large Growth	62.23%
Vanguard US Growth Investor	12-31-20	Large Growth	58.57%
Franklin DynaTech A	12-31-20	Large Growth	57.68%

Active Management for Investors with a Long-Term Time Horizon



As of March 17, 2021 (After Fees)	2021 YTD	1 Year	2 Years	3 Years	4 Years	Inception (Jan 1, 2017)
LPAM Tactical Opportunity	-3.32%	+154.18%	+128.80%	+137.99%	+196.62%	+216.74%
S&P 500 Price Index	+5.81%	+57.13%	+40.80%	+44.41%	+67.10%	+77.51%
Outperformance	-9.13%	+97.05%	+88.00%	+93.58%	+129.52%	+139.23%

As of March 17, 2021 (After Fees)	2017	2018	2019	2020	Inception (Jan 1, 2017)
LPAM Tactical Opportunity	+22.28%	-5.62%	+41.20%	+101.05%	+216.74%
S&P 500 Price Index	+19.42%	-6.24%	+28.88%	+16.26%	+77.51%
Outperformance	+2.86%	+0.62%	+12.32%	+84.79%	+139.23%

Past performance is not indicative of future results

LifePro Asset Management, LLC is registered as an Investment Adviser and is not an Investment Company (also referred to as a mutual fund). Investments involve risk. There can be no assurance that the future performance of any specific investment strategy will be profitable or equal any historical performance. Due to various factors, including changing market conditions, performance is based on the calculation date noted within the table. Morningstar's Large-growth portfolios are comprised of large-cap stocks which are expected to grow at a faster pace than the rest of the market as measured by forward earnings, historical earnings, book value, cash flow and sales. LifePro Asset Management's Tactical Opportunity strategy is an absolute return investment discipline that combines asset allocation with sector and stock selection to target growth and value stocks. As the Tactical model allows the portfolio to ebb and flow at times the portfolio may resemble Large Blend where neither growth nor value characteristics predominate the allocation. These portfolios tend to invest across the spectrum of U.S. industries and are often similar to those of the S&P 500 Index. S&P 500 is an unmanaged index of the shares of 500 widely held, predominantly large capitalization, U.S. exchange-listed common stocks. Investors cannot invest in any index directly.