



Inspire Select Conservative Strategy

PLATFORM

Select (55bps)

STRATEGY TYPE

**Long-Term Strategic
Allocation Model**

OBJECTIVE

**Income Preservation
with some Capital
Appreciation**

RISK PROFILE

Conservative

ALLOCATION

40% Equity / 60% Fixed Income; exposure to large, mid, and small-cap US, international developed, and emerging markets equities and large-cap US investment-grade corporate bonds

The Inspire Select Conservative Strategy is built as a long-term, strategic allocation model designed to provide broad exposure across a fully diversified global equity universe while maintaining 60% exposure to large-cap US investment-grade corporate bonds. The equity portion of this strategy is primarily composed of individual stocks and includes U.S. large-, mid-, and small-cap equities, as well as international developed and emerging markets equities. Target allocations are established based on long-term macroeconomic market assumptions developed by Inspire's Investment Committee. The portfolio is systematically rebalanced at the start of each calendar quarter to maintain alignment with these strategic targets.



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These strategies are model allocations and may not reflect actual client portfolios. Allocations are subject to change and may vary.