



Inspire Select Very Conservative Strategy

PLATFORM

Select (55bps)

OBJECTIVE

Income Preservation

STRATEGY TYPE

**Long-Term Strategic
Allocation Model**

RISK PROFILE

Very Conservative

ALLOCATION

20% Equity / 80% 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 Very 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 80% 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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Certain statements may include forward-looking information based on current beliefs, expectations, and assumptions. These statements are not guarantees of future performance and involve known and unknown risks, uncertainties, and other factors that may cause actual results to differ materially. Inspire undertakes no obligation to update or revise any forward-looking statements.

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