

# Income Generator Portfolios

We are fundamental, incremental,  
and global in our thinking.

## Portfolios Specifically Designed for Generating Current Income

Today's low interest rate environment has left many investors scrambling for income from their investment portfolios. Many "Baby Boomers" nearing or already in retirement need income-based investment solutions to assist in covering monthly expenses.

CMC's Income Generator Portfolios ("the Portfolios") enable you to provide your clients with investment options designed specifically to meet a need for regular monthly income.<sup>1</sup> CMC conducted extensive manager research to identify mutual funds that could meet this specific investment objective.

Our search was narrowed to only a handful that showed the capacity to accomplish their income investment goals while contributing to robust asset allocation across the Portfolios. The variety of asset classes represented in these Portfolios helps generate diversified sources of investor income which can dampen Portfolio volatility over time.<sup>2</sup>

<sup>1</sup> Some investments may make quarterly distributions. There can be no guarantee that underlying investments maintain consistent income distributions. Distribution schedules may change over time.

<sup>2</sup> Due to the variability of investment performance there can be no guarantee that the diversification of Portfolio investments will be successful in generating income or reducing overall portfolio volatility in all market cycles.

<sup>3</sup> Past performance does not guarantee future results. Investments included in the Portfolios are subject to change at the discretion of Capital Market Consultants, Inc.

## Capital Market Consultants, Inc.

A research and asset management firm focused on serving other advisors, CMC provides investment solutions and outsourced Chief Investment Officer services for wealth management professionals. Founded in 2002, CMC is headquartered in Milwaukee, WI. For more information contact:

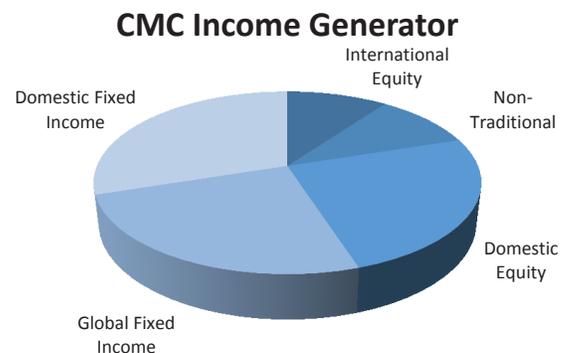
Barry Mendelson. CIMA  
barry@cmarkc.com  
414-727-7995

Alex Powell  
alex@cmarkc.com  
414-727-7999

## Income Generator Portfolios by CMC

The types of investments included in the Portfolios have historically generated investment returns in excess of their pure income returns, creating the opportunity for capital appreciation over time.<sup>3</sup>

Exposures currently include:



CMC conducts regular and ongoing due diligence on the investment managers included in the Portfolios to help ensure that they are maintaining their investment discipline and helping to meet the overall Portfolio goals.