

Total Return Strategies

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

Portfolios Specifically Designed for Reliable Asset Allocation

Often lost in the presumed glamor of the latest investment fad, traditional strategic investing has continued to offer advisors prudent diversification and reliable asset allocation implementations so critical to achieving long term wealth management goals. Far from underachieving, straightforward stock and bond portfolios have provided handsome returns in recent years.

CMC's Total Return Portfolios ("the Strategies") enable you to plan for and provide your clients with globally diversified but actively managed investment options designed specifically to meet their long term investment needs based on sensible forward-looking capital market assumptions.

CMC designs and actively manages multi-asset class allocations and conducts extensive manager research to identify mutual funds, ETFs and or money managers that it believes can meet objective performance goals. When these selections are combined they can help investors achieve a variety of investment objectives from aggressive to conservative in a risk controlled fashion.

Institutional Quality Research For Advisors

Our institutional search process narrowed the field of suitable funds to only a handful in each asset class which have showed the history, capacity and promise to accomplish their investment goals while contributing to robust asset allocation across the Strategies.

Exposures currently include:

Equities	Fixed Income	Alternatives
<ul style="list-style-type: none">• U.S. Large, Mid and Small Cap: Value, Core, Growth• International Developed• Emerging Markets• Frontier Markets	<ul style="list-style-type: none">• Investment grade and high yield taxable and tax exempt bonds• International bonds (with or without currency overlay)• TIPS• Bank loans• Mortgage securities• Corporate bonds• U.S. Treasuries• T-bills• Cash• ABS	<ul style="list-style-type: none">• MLPs• Real estate• Commodities• L/S equity/fixed income• Market Neutral• Global Macro• Managed Futures• Absolute Return• Tactical• Unconstrained Bond

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

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