GLOBAL VIEW CAPITAL MANAGEMENT & CASTLEVIEW PARTNERS

A team you can count on!

EXECUTIVE SUMMARY

Global View Capital Management

Global View Capital Management, LLC. a SEC-Registered Investment Advisor, offers a unified managed account program with over 200 managed account strategies offered from 20 institutional money management firms. The advancements in technology, trading platforms and exchange-traded products have enabled the average investor to access asset classes and trading strategies that were not previously available for the average retail investor. The actively managed, non-correlated strategies, when combined in one simple portfolio, deliver a highly sophisticated form of diversification with an emphasis on **downside protection**.

QUICK FACTS

- Over 20 Money Manager Firms
- Over 200 Separately Managed Account Strategies
- Over 300 Mutual Fund & ETF Selections

AXOS Wrap Account Program

- No account minimum
- .90% program fee plus maximum 1.4% advisor fee

Schwab Large Account Program

- $15,000 account minimum
- 1.0% program fee plus maximum 1.4% advisor fee

Schwab Small Account Program / Schwab PCRA Program

- $2,000 account minimum
- .50 -.75% program fee plus maximum 1.4% advisor fee

Low-Cost Account Program

- $2,000 account minimum
- .40% program fee plus maximum 1.4% advisor fee

One Simple Portfolio

INSTITUTIONAL-QUALITY DIVERSIFICATION

MONEY MANAGERS

Global View Capital Management; AMP Wealth Management; American Funds From Capital Group; Astor Investment Management; Beaumont Capital Management; BlackRock; Catalyst Funds; Clark Capital Management Group; Lear Investment Management; Cougar Global Investments; Congress Asset Management Company; QIS Since 1977; Dimensional; Day Hagan Logix; Polen Capital; Kensington Asset Management; Ned Davis Research Group; St. James Investment Company Private Investment Accounts; Scalar Gauge Fund; Oakview Capital Management; State Street; Vanguard; SpiderRock Advisors; River Road Asset Management; Donoghue Forlines; Schwab Personal Choice Retirement Account® (PCRA); clearstead Advisory Solutions

CUSTODIANS

E*TRADE axos; Fidelity Investments; RBC; charles SCHWAB; Nationwide

Investment Advisory Services

- Unified Managed Accounts
- Multi-Strategy Portfolios
- Mutual Fund Wrap Program
- ETF Index Portfolios
- Tactical & Strategic ETF Strategies
- Dimensional Fund Advisors (DFA) Fund Solution
- Variable Insurance Sub-Account Portfolios

Investment Options

- Exchange Traded Funds
- Mutual Funds
- Individual Stocks & Bonds
- Municipal Bonds
- Master Limited Partnerships
- Variable Insurance Sub-Accounts
- Options Strategies

Investment Methodologies

- Tactical Analysis Approach
- Strategic Analysis Approach
- Dynamic Analysis Approach
- Traditional Modern Portfolio Approach

Powered by:

αi Alpha TECHNOLOGIES

Built by and for leading-edge advisors, aiAlpha's integrated, end-to-end FinTech platform puts the best digital tools at the fingertips of advisors determined to efficiently deliver service quality to their clients. Through a state-of-the-art dashboard, advisors manage the entire client lifecycle, from proposal generation to account opening to account management (trading and rebalancing) to financial planning to reporting. This technology platform is complemented by a carefully curated best-of-breed, open architecture investment platform.