

Vantage Proprietary Strategies

Vantage's professionally managed portfolios include individual and model-based strategies combining a blend of low-cost market-tracking indexes and select active managers toward ideal diversification and risk management.

Individual Strategy:

Flexible and tailored, this approach balances our client's goals around market conditions and opportunities. A combination of mutual funds, ETFs, structured notes, individual bonds, and stocks are incorporated with consideration of the client's existing holdings and current income needs. Additionally, a Covered Call Option overlay may be added when suitable to generate additional income and reduce volatility.

Model Portfolio:

To diversify across the global marketplace using equities, fixed income, and other suitable asset classes, this portfolio is built upon a model design of ETFs (Exchange Traded Funds). Comprised of lower cost securities and managed through tactical rebalancing, the portfolio positions for upcoming opportunities while maintaining risk exposure suitable to the elected objective.

Stock Focus:

When individual stocks are preferred and can offer greater diversity and opportunity, this focus combines individual equities with actively managed fixed income by allocating into recognizable names and companies. Our Covered Call Option overlay is typically included toward additional income, divesting and risk management.

Call us at (847) 590-9191 or visit www.vantagefinancial.com to learn more about working with us.