

Inspire SMA Models

"Select" models consist of individual equities, non-"Select" models use ETFs as core holdings

ALLOCATION NAME	DESCRIPTION	RISK LEVEL
Inspire Select Global Impact Equity → Inspire Global Impact Equity	Globally diversified portfolio utilizing an equally weighted, passively managed index strategy with asset allocation weighted 100% to equities.	Aggressive
Inspire Select Global Impact Aggressive → Inspire Global Impact Aggressive	Globally diversified portfolio utilizing an equally weighted, passively managed index strategy with asset allocation weighted 80% to equities and 20% to fixed income securities.	Aggressive
Inspire Select Global Impact Moderate → Inspire Global Impact Moderate	Globally diversified index based portfolio utilizing an equally weighted, passively managed index strategy with asset allocation weighted 60% to equities and 40% to fixed income securities.	Moderate
Inspire Select Global Impact Conservative → Inspire Global Impact Conservative	Globally diversified index based portfolio utilizing an equally weighted, passively managed index strategy with asset allocation weighted 40% to equities and 60% to fixed income securities.	Conservative
Inspire Select Core/Satellite Opportunities → Inspire Core/Satellite Opportunities	Seeks to invest in sectors with the best perceived opportunities for growth, with asset allocation weighted 100% to equities.	Aggressive
Inspire Select Core/Satellite Opp. 70/30 → Inspire Core/Satellite Opp. 70/30	Seeks to invest in sectors with the best perceived opportunities for growth, with investments weighted 70% to equities and 30% to fixed income securities.	Moderate
Inspire Select Tactical Risk Management → Inspire Tactical Risk Management	Globally diversified, conservative risk management strategy that seeks to move assets defensively when risk levels are high with asset allocation weighted 100% to equities when not positioned defensively.	Conservative
Inspire Select Tactical Risk Management 70/30 → Inspire Tactical Risk Management 70/30	Globally diversified, conservative risk management strategy that seeks to move assets defensively when risk levels are high with asset allocation weighted 70% to equities and 30% to fixed income when not positioned defensively.	Conservative
Inspire Select Dividend Income 70/30	All Cap focused portfolio of 20 US stocks from the Russell 1000 Index with high dividend yields and low price to earnings ratios.	Strategic

*For accounts over \$5M we provide custom allocations