

Am I a GenerationTech™
Investor?



Entasis
ASSET MANAGEMENT



GenerationTech™ Investing

Who is GenerationTech™?

We believe GenerationTech™ is a class of people that enjoy the time and communication efficiencies that are provided by technology. Much has been written about Baby Boomers or Generation X or the Millennials, but we believe that an interest in technology crosses generational lines. Younger people may have grown up with it, but people of all ages are growing into it. We believe this group of individuals possesses a combination of the following traits and preferences:

- They want high quality investment advice
- They prefer low touch communication on their time by email, video or social media
- They expect low fees because they have lower communication requirements
- They may be just starting to invest and expect lower minimums
- They want a highly efficient and uncomplicated account opening and update process

What are the Entasis GenerationTech™ asset allocation strategies?

Our GenerationTech™ asset allocation strategies are an extension of our investment planning service. They rely on the same in house investment research that is used to develop all client portfolios at Entasis. The differences between the GenerationTech™ portfolios and our traditional investment planning services are designed around the traits and preferences of the people that comprise what we have defined as GenerationTech™.

These are portfolios designed for investors beginning to accumulate wealth (household investable assets \$50,000 and up) and investors with greater investable assets that prefer efficient, low touch client service from their advisor.

These portfolios give all investors access to high quality investment advice in a highly efficient package. The popular press has coined similar offerings as “Robo” or “FinTech” portfolios. We like technology at Entasis, but we aren’t robots and our portfolios aren’t passively managed. They are researched and actively managed.

Characteristics

- Low fee
- Low minimum
- High quality
- Low touch
- High efficiency



GenerationTech™ Investing

Should I consider a GenerationTech™ asset allocation strategies?

Take this short quiz to determine if you are a GenerationTech™ investor.

- A. How often do you use social media?
 - 1. Daily
 - 2. Occasionally
 - 3. Never

- B. How do you manage your personal finances?
 - 1. Everything is organized on mint.com (or similar)
 - 2. I pay most of my bills online
 - 3. I still write checks for most things

- C. Which statement describes your investing knowledge?
 - 1. I prefer not to think about my investments
 - 2. I enjoy reading about the stock market
 - 3. I do my own investment research

- D. What is your next big life change?
 - 1. I might switch jobs
 - 2. My kids are starting school
 - 3. I am thinking about retirement

- E. How do you think about investment advice?
 - 1. I am pretty independent
 - 2. I would like to have some help
 - 3. I need someone I can talk to regularly

- F. What phrase best describes how you shop?
 - 1. I love a good deal
 - 2. I will pay more for certain things
 - 3. Premium is always better

- G. Describe how you use technology.
 - 1. My mobile device is an extension of my hand
 - 2. I use my phone for text, email and calls
 - 3. I use my computer for email



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- H. Describe your experience with investment advisors.
1. I have never used an advisor
 2. I rely on the resources on Schwab.com (or similar)
 3. I speak with my advisor regularly
- I. How do you like to check on your investments?
1. I hate to think about them
 2. I look at my quarterly statements
 3. I check on them daily
- J. Which statement would best describe your reaction to a 10% drop in the stock market?
1. I focus on my long-term goals
 2. I would consult a friend I trust
 3. I would call my advisor

Please go back and add up the total of your answers. Your total should range from 10-30.

10-15 – You are a GenerationTech™ investor

16-20 – Call us and we can help you decide

21-30 – Please consider our Investment Planning services



To learn more please visit us at
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