Strategic Allocation Portfolios

Investment Solutions That Grow With Your Life

PARALLEL PORTFOLIOS

The Problem: Investment Decisions Shouldn't Be This Hard

You're facing a maze of investment choices while juggling life's biggest transitions. You need an investment strategy that actually makes sense for where you are today—not a one-size-fits-all approach that ignores your reality. **Sound familiar?**

The Solution: Strategic Allocation Portfolios (SAP's)

SAPs make the allocation decision easy by aligning your investments with your life stage. No more guesswork. No more complexity. Just clear, professionally managed portfolios designed for exactly where you are in life.

THREE LIFE STAGES. THREE CLEAR PATHS.

ACCUMULATION	PRE-RETIREMENT	IN RETIREMENT
Building wealth for the future	Balancing growth with stability	Living off your assets

Why Choose Strategic Allocation Portfolios?

SAPs eliminate investment complexity by providing clear, life-stage appropriate allocation models that evolve with your needs, so you can focus on what matters most while professionals handle your portfolio strategy.

Accumulation		Pre-Retirement		Distribution	
Growth Focus		**Growth Focus**		**Growth Focus**	
Core Builder Growth	**$150k Min.**	**Core Builder Moderate**	**$150k Min.**	**Hedged Conservative**	**$150k Min.**
Core Appreciation	60.00%	Core Appreciation	43.00%	Hedged Equity	32.00%
International	10.00%	International	6.00%	International	7.00%
SMID	10.00%	SMID	6.00%	SMID	6.00%
Velocity AI	20.00%	Velocity AI	10.00%	Fixed Income	35.00%
		Fixed Income	35.00%	Endowment	20.00%
Dividend Focus		**Dividend Focus**		**Dividend Focus**	
Dividend Builder Growth	**$150k Min.**	**Dividend Builder Moderate**	**$150k Min.**	**Dividend Conservative**	**$150k Min.**
Dividend Growth	60.00%	Dividend Growth	43.00%	Dividend Growth	32.00%
International	10.00%	International	6.00%	International	7.00%
SMID	10.00%	SMID	6.00%	SMID	6.00%
Velocity AI	20.00%	Velocity AI	10.00%	Fixed Income	35.00%
		Fixed Income	35.00%	Endowment	20.00%
Smaller Accounts		**Smaller Accounts**		**Smaller Accounts**	
Dynamic Growth	**$15k Min.**	**Dynamic Moderate**	**$50K min.**	**Dynamic Conservative**	**$50K min.**
Dynamic ETF Allocation	100.00%	Dynamic ETF Allocation	65.00%	Dynamic ETF Allocation	45.00%
		Fixed Income	35.00%	Fixed Income	55.00%
10 Stock Growth	**$50K Min.**	**10 Stock Moderate**	**$50K Min.**	**10 Stock Conservative**	**$50K Min.**
10 Stock	60.00%	10 Stock	60.00%	10 Stock	60.00%
Core Growth ETF	40.00%	Core Moderate ETF	40.00%	Core Balanced ETF	40.00%

Ready to Simplify Your Investment Strategy?

Contact Parallel Portfolios today to discover which Strategic Allocation Portfolio is right for your life stage.

PARALLEL
PORTFOLIOS

VISIT US AT PARALLELPORTFOLIOS.COM
TO LEARN MORE ABOUT OUR INVESTMENT STRATEGIES

135 S. Main Street. Ste. 600, Greenville SC 29601
864-385-7999 | greg@parallelportfolios.com