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Certificate





Experts in Tactical Investment Strategies



Dina Fliss,
 President, Global View Capital
 Management (GVCM) & Chief
 Investment Strategist

Global View Capital Management (GVCM) is transforming lives by delivering comprehensive financial solutions that help achieve economic security for the future. At the heart of its success lies its signature asset allocation strategies and a proprietary FinTech platform.

Unlike the traditional buy-and-hold philosophy, the company's asset management methodology emphasizes downside protection during volatile markets. Through its turnkey asset management platform (TAMP), GVCM integrates a non-correlated stream of investment strategies into a single unified managed account (UMA). This setup combines cash management, fixed income, tactical cores and alternative investments, such as precious metals and crypto

assets, offering clients a more flexible and dynamic approach to portfolio management.

"By uniting multiple strategies into one account, we've reached a new milestone in the science of tactical asset allocation," says Dina Fliss, president, Global View Capital Management (GVCM) & chief investment strategist.

The platform provides advisors with 24/7 access to financial plans from any device, enabling real-time updates, comparisons and on-the-go adjustments. Its ability to execute multiple model trades, across thousands of client accounts, within minutes demonstrates a level of precision and speed unmatched in the industry. Its FinTech platform called aiAlpha is now being licensed to other registered investment advisor firms (RIA) seeking to elevate their trading capabilities. The combined assets under management of all these RIAs exceed \$2.5 billion.

A Dynamic Approach to Asset Management

UMAs provide a versatile portfolio that goes beyond traditional asset class diversification. Typically, diversification involves spreading investments across various assets like stocks, bonds, and real estate to reduce financial risk. When one asset class underperforms, another might compensate. But in times of crisis like a recession or market crash, all assets are likely to correlate and go down together, highlighting the drawback of traditional diversification.

GVCM offers a better approach to diversification across strategies, time frames, money managers, and different asset classes. This offers robust downside protection, as its tactical managers can dynamically adjust to market conditions. Clients are provided with a more resilient investment experience compared to traditional models that rely on fixed risk-based asset allocation formulas. (The modern portfolio theory)

When a former RIA owner entrusted their family's assets to GVCM after selling their firm and exploring retirement, the concept of tactical asset allocation was discussed. Despite managing hundreds of millions of dollars for over 40 years,



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the client had never utilized tactical management and was genuinely impressed when GVCM introduced the idea. Intrigued by the potential, they decided to test the waters by investing a small portion of their assets.

Under the effective asset allocation strategies, their portfolio grew over time. They transferred more assets, eventually putting all family funds under GVCM's management. In time, they achieved significant results, including enough gains in their first year to fund an extravagant European vacation for 14 family members. This success solidified the family's trust in GVCM and converted them into advocates for its top-notch services.

Empowering Advisors for Lasting Success

GVCM empowers financial advisors by providing them with the tools, support, and independence to build and grow their wealth and business. It offers flexible affiliation models, allowing advisors to structure their enterprises as they see fit while maintaining full ownership of client relationships. They gain access to a suite of services, including home office support, a customizable investment platform with leading tactical strategies and integrated technology to streamline operations. Ongoing training, mentorship and compliance oversight further support financial professionals to accelerate growth and thrive in a constantly evolving industry.

A pivotal shift in GVCM's business strategy occurred in 2022 with the launch of an equity compensation program. The initiative allowed financial advisors and headquarters staff to become shareholders, aligning their interests directly with the firm's growth. By granting equity, GVCM fostered a culture of collaboration and ownership—a transformation that has significantly driven the firm's rapid growth.

In just two years, GVCM's assets under management surged from a few hundred million dollars to over \$750 million. This growth highlights the firm's potential to continue expanding its influence in the asset management industry. As it rapidly expands across the United States and into Canada, this success reflects the firm's commitment to broadening its reach and enhancing its service offerings, which cater to the evolving needs of the financial advisory and private wealth space.

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Recognized for three consecutive years as a leading player in the financial asset management sector by Financial Services Review, Global View Capital Management stands as a formidable player in the market. By leveraging a combination of technology and collaborative teamwork, it offers a differentiated, high-value service to clients and financial advisors alike and empowers them to achieve lasting economic success. **Is**