CORBETT ROAD
WEALTH MANAGEMENT

Year-by-Year Return (%)
Dynamic TX

As of **December 31, 2023**

Year	**Dynamic TX** (gross)	**Dynamic TX** (net)	Tactical Competitor Average	Moderate Competitor Average
2023	**13.10**	**12.23**	10.58	13.22
2022	**-16.17**	**-16.81**	-15.55	-14.77
2021	**25.23**	**24.27**	13.16	10.19
1-Yr	**13.10**	**12.23**	10.58	13.22
Since Inception	**11.61**	**10.76**	5.92	6.06

For Internal Fidelity Use Only – Not for Client Distribution

Performance figures shown "gross" of fees do not reflect the payment of investment advisory fees and other expenses. Net Returns are reduced by the investment advisory fees and any other expenses the client may incur in the management of its investment advisory account. To calculate the net performance for non-fee paying accounts in the composite a fee of 0.95%, which is the highest fee charged to clients in this strategy, has been applied to the client's gross performance. In addition to fees paid to Corbett Road, entities advising mutual funds, exchange traded securities, and pooled investment vehicles, will also charge underlying fees and expenses for managing the investment product. The highest additional fee an investor should expect to pay for an investment in Dynamic would be 9bps (9/100 of 1%). Cost may change overtime due to changes in the fees charged by third party managed ETFs used in this strategy.

'Tactical Competitor Avg' is the US Fund Tactical Allocation (primary benchmark). Tactical allocation portfolios seek to provide capital appreciation and income by actively shifting allocations between asset classes. These portfolios can have material shifts across equity regions and bond sectors on a frequent basis. 'Moderate Competitor Avg' is the Morningstar Moderate Target Risk TR USD (secondary benchmark). Moderate-allocation portfolios seek to provide both capital appreciation and income by investing in three major areas: stocks, bonds, and cash. These portfolios tend to hold larger positions in stocks than in conservative-allocation portfolios.

This presentation is not to be considered investment advice and is not to be relied upon as the basis for entering any transaction or advisory relationship or making any investment decision. All investments involve the risk of loss, including the loss of principal. Past performance is not an indicator of future results.

Investors should consider the investment objectives, risks, charges, and expenses of each strategy before making an investment decision. This and other information about the strategies presented, including additional risks, are contained in Corbett Road's Form ADV Part 2 available at https://adviserinfo.sec.gov/firm/summary/305063, which you should read carefully before you invest. Additional information pertaining to ETFs used for investment purposes can be found in the prospectus for each ETF.

Gross performance is defined as the performance results of a portfolio before the deduction of all fees and expenses. Net performance is defined as the performance results of a portfolio after the deduction of all fees and expenses that a client or investor has paid or would have paid in connection with the adviser's services to the relevant portfolio, including, if applicable, advisory fees, advisory fees paid to underlying investment vehicles such as MFs and ETFs, and payments by the investment adviser for which the client or investor reimburses the investment adviser. Custodian fees paid to a bank or other third-party organization for safekeeping funds and securities are excluded from the calculation of net performance. Advisory fees charged to Corbett Road clients, are described in Corbett Road's Form ADV Part 2 and Part 3 available at https://adviserinfo.sec.gov/firm/summary/305063. Non-fee-paying accounts reflect the deduction of the highest possible fees for each strategy to calculate net performance.

Investors cannot invest in a market index directly, and the performance of an index does not represent any actual transactions. The performance of an index is not an actual client portfolio which is subject to the deduction of various fees and expenses which would lower returns.

Use of Indicators
Corbett Road's quantitative models utilize a variety of factors to analyze trends in economic conditions and the stock market to determine asset and sector allocations that help us gauge market movements in the short- and intermediate term. There is no guarantee that these models or any of the factors used by these models will result in favorable performance returns. Models used by Corbett Road are reviewed periodically. Inputs, factors, and indicators used in these models are subject to change.

Dynamic TX Strategy
All information is based on sources deemed reliable, but no warranty or guarantee is made as to its accuracy or completeness.

Corbett Road Investment Management ("CRIM") is a Subchapter S Corporation. CRIM claims compliance with the Global Investment Performance Standards (GIPS®). CRIM has been independently verified for the periods January 1, 2014 to December 31, 2021.

CRIM together with Spire Investment Partners LLC, form Corbett Road Investment Partners, LLC. Corbett Road Investment Partners, LLC is the entity that owns Corbett Road Capital Management, LLC (CRCM), a registered investment adviser.

Corbett Road Wealth Management, LLC (CRWM) is a dba name for the group of financial advisors who are registered with Spire Wealth Management, LLC, a subsidiary of Spire Investment Partners LLC.

Together, CRCM and CRWM manage a variety of investment strategies that are offered to different groups of clients. CRCM offers investment advisory and sub-advisory services to institutionally oriented accounts, which include accounts with financial advisory firms as well as clients who open an account with $20 million or more in assets with the Firm, while CRWM offers advisory services to directly to individual High Net Worth and retail investors.

CRIM oversees the accounts of CRWM and CRCM that have signed an investment management agreement.

Valuations are computed and performance is reported in U.S. dollars. A complete list of composite descriptions is available upon request. Policies for valuing portfolios, calculating performance, and preparing compliant presentations are available upon request. To obtain a compliant presentation for the associated strategy, please contact us at 703.748.5831 (local) or 844.878.4897 (toll free).

CORBETT ROAD
WEALTH MANAGEMENT

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Contact us to discuss how Corbett Road can help you achieve your goals.

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