



# Active Fixed Income

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## Investment Objective

Fixed Income only strategy with exposure to all sections of the bond market that seeks to generate consistent stream of income payments and capital preservation. Built with individual municipals, corporates, treasuries, CDs as well as supplemental exchange trade funds and mutual funds.

- Minimum Investment: \$300,000
- Current Total Yield: 5.75% (Net 4.75%)
- Target Portfolio Duration: 6.1 Years

## Investment Team

**Robert C. Stimson, CPA**

CIO, Lead Portfolio Manager

**James R. Moise**

Analyst/ Equity Trader

**David K. Mullen**

Analyst

**Hampton W. Boyd**

Associate

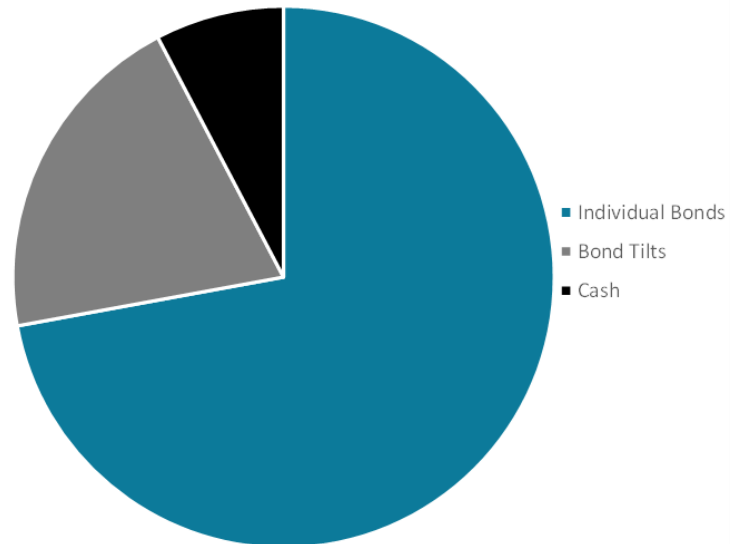
## Company Overview

Little House Capital, LLC is an SEC Registered Investment Advisor. The firm was established to redefine the wealth management experience by integrating investment management, financial, tax and estate planning strategies. We provide seamless and comprehensive goals-based solutions that seek to achieve desired outcomes for individuals, multi-generational families, trusts and institutions.

## Contact Info

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## Allocation



Asset Class	Weight
<b>Individual Bonds</b>	<b>72%</b>
Corporates	50%
Taxable Municipals	14%
Governments	8%
<b>Bond Tilts</b>	<b>24%</b>
<b>Cash</b>	<b>4%</b>

Asset Class	Current Yield	Bond Maturity	Weight
Bonds	5.8%	2027	14.3%
Cash	5.0%	2028	14.3%
<b>Total</b>	<b>5.8%</b>	2029	14.3%
		2030	14.3%
		2031	14.3%
		2032	14.3%
		2033	14.3%

Disclosure - Investment products and strategies are not guaranteed by Little House Capital LLC, are not insured by the FDIC or by any other government agency and may lose value. The performance quoted represents past performance and does not guarantee future results. Performance is net-of-fees based on a standard fee of 1.0%/yr. Holdings and allocation may not reflect our current investment views and should not be used as the basis for an investment decision. Determining the suitability of this product will depend on feedback and risk tolerance of individual clients. For legal and tax matters, legal and tax advisors should be consulted. All material is believed to be reliable, but accuracy is not guaranteed. This is not a warranty for liability on decisions based on such information. This is not a solicitation for any order to buy or sell securities and is for discussion purposes only. Performance, risk/reward characteristics, and charts provided by Bloomberg.