



# BUSINESS INVESTMENT

**E EQUITY**  
**F FLEX**



## Why invest with **Equity Flex**?

Invest and secure your assets under a decentralised Trust Company



## About us

Equity Flex is a fee-only investment adviser serving institutional and private clients globally. If you've worked hard and saved throughout your life, we can help you retire comfortably and confidently through tailored money management, industry-leading client service, illuminating insights and a fee structure aligned with your success.

For more than 3 years, and through all kinds of markets, we've helped millions of people around the globe achieve their personal financial goals. Whether you're investing for retirement, education, or something else, our distinctive approach can help you invest confidently for the future you envision

## How Does Equity Flex Differ From The Competition?

Unlike many money managers that sell cookie-cutter portfolios, we tailor portfolios to your individual needs and goals. Equity Flex doesn't sell high-commission investment products and earns no commissions on trades. We simply charge a management fee based on the size of your account—so we do better when you do better. Furthermore, you will have a dedicated Investment Counsellor who calls regularly to keep you informed (not because we have something to sell).



## Our Approach

### **We Actively Monitor Markets**

Our experienced analysts continuously monitor capital markets on a global scale—keeping an eye on market conditions, economic developments, and political issues. This information guides the portfolio management process in both identifying opportunities and recognizing risk factors. We summarize this information for clients through a variety of communications—keeping you apprised of our market thinking and what’s happening inside your portfolio.

### **A Top-Down Investment Approach**

Two common approaches to investment portfolio construction are bottom up investing and top-down investing. A bottom-up investing approach is essentially a stock-picking method where you focus on individual security selection rather than a portfolio’s allocation to various countries, company-sizes, security types or other characteristics. However, we prefer a top-down investing approach. This method emphasizes broader economic factors. The strategy determines the allocation and selection of assets based on macroeconomic characteristics and how they expect to affect different areas of the market. Once the investors have identified the areas they think will perform well, they can select individual securities within those areas.

### **Flexible strategy**

The Importance of a Flexible Investment Strategy and diversification  
Many investment managers and funds specialize in particular areas of the market. They might invest in only US stocks, high-yield bonds or even more specific areas of the market, like small-cap growth stocks. A snapshot of their performance at any given moment might seem impressive. But what happens when their narrowly focused investment strategy falls out of favor?

In our experience, no single strategy is always superior, and those who adopt such an approach can underperform as leadership styles continually rotate. At Equity Flex, we use an active investment approach, led by our Investment Policy Committee and in-house Research department, which helps us respond to market shifts and their impact in clients' portfolios... Equity Flex employs a large team of investment professionals who analyze regions, countries, sectors and industries. When managing investments for our clients, we believe this comprehensive approach to research allows us to invest across a variety of areas in the market, using a flexible strategy designed to help capture potential opportunities for our clients consistent with their goals and objectives.

Our active investing strategy is based upon our forward-looking view of markets. We make tactical adjustments along the way, moving clients' portfolios into the types of stocks and bonds we expect to perform best. A portfolio that provides zero exposure to almost half of developed world equity markets is the opposite of diversified. But many investors' portfolios might be doing just that if their investment firm only focuses on US companies and ignores the 40%+ of international developed-world equity markets.<sup>1</sup> Such investors lack exposure to foreign markets whose stocks often trade leadership with US stocks, which can help reduce overall portfolio volatility. At Stockearners, we set ourselves apart by approaching asset management from a global perspective. We invest globally to help hedge against domestic downturns, expose portfolios to more opportunities, diversify and, over time, reduce volatility.

### **World-Class Client Service and Support**

When you choose Equity Flex, you will get a dedicated Investment Counselor who acts as a liaison between you and the IPC, communicates changes about your portfolio to you and helps you stay informed about investment strategy.

You will also have access to a variety of events designed to provide regular market updates and answer any questions you have about your Equity Flex portfolio, unlike most Brokerage Firm that keep you in dark. These are just some of the ways in which Equity Flex provides clients with a flexible investment strategy designed to help them respond to market shifts.



The potential of the Investment market is unlimited. You can earn high returns by investing in a secure portfolio account without being skilled at Investment.



Our Investment service has undergone a compliance check by multiple international auditing firm.

We share newsletters and regular updates about what happens in the company



You can withdraw your profits, or all of your funds, at any moment via dashboard. You can also spread your risks by investing in several diversified accounts.

Build a diversified portfolio and hedge against market volatility Investors finally have the opportunity to invest outside of traditional stocks and bonds markets thanks to the Equity Flex Growth REIT fund. Here's how the fund works:

Our experienced real estate team pinpoints properties with the highest potential.

We purchase, renovate and manage apartment buildings across the country the fund renovates the units to increase the cash flow. This immediately increases the building's value as well as the rents.

Cash flow from rents is reinvested throughout the fund's term to continue adding new properties and funding renovations. Since all properties are cash flowing, we wait and let the assets further appreciate so we can sell them at a maximum profit.

When the market is right, we sell the assets and redistribute profits among investors.

From the moment you invest, your dollars are hard at work. When you invest with Equity Flex, you are investing with a partner, not just a broker. Other broker platforms charge you unnecessary middleman fees. Our key differentiator is that we are a sponsor-direct platform. This means we own and manage all of our own assets. Your investment is managed by us and your return will come under our ownership alone, removing several layers of third-parties and their fees. We provide value by strategizing and leveraging industry knowledge to maximize your return. Our team is involved throughout the whole investment lifecycle to ensure you are provided the managed investment you hoped for. We provide decades of successful real estate investing experience while we pursue the best results for our invests.

The Equity Flex Growth REIT is designed to be a long-term investment and is inherently illiquid in nature. It has a 2-year projected term. We aim to invest in projects that can be sold within approximately two years. We maintain several cash-flowing properties in the portfolio, generating revenue from rents. When market conditions are suitable for an advantageous liquidation event, we sell the assets at which point investors will receive their principal and returns back. Our team shares the same vision and we have the experience. We have the team, the platform and the technology to make it happen and nothing's going to stop us from bringing wealth-building opportunities to the everyday investor.



As a parent, We want the best for our kids. We want to do everything Possible to set them up for success.

We at Equity Flex have spoken with many parents and grandparents who have one simple question: How can I invest in my child or grandchild's future? Knowing the power of compound interest, some couple wrote us that they wanted to kick-start their son's retirement savings. Others just want to help their kids get a college diploma without taking on any debt.

Those are great concerns to have, so give yourself a high five! Whether "Junior" is still crawling around the living room floor or getting ready to graduate from high school, we got you covered, you can secure and invest in their future. The Equity Flex Children's Account is a unique investments account designed to allow parents invest then save for their children's future and teach them about savings/investments from a tender age. The account is modeled in two tiers for young children and teens with an overarching objective of making savings fun for them and teaching them financial discipline.



Our work would not be possible without you: global citizens who want to make positive, lasting change in children's lives. We are grateful to each and every one of you.

We partner with corporations, foundations, individual philanthropists, school groups, and more, connecting our donors to communities and children who would otherwise be overlooked. Whether you're an executive looking to boost your company's social responsibility efforts, or a grandmother wanting to make a special gift in a child's honor; we're here to help you make a difference in the world. On behalf of the millions of children that'll be impacted by your generosity – thank you.

We partner to build a world where all children and youth enjoy equal resources and opportunities in society and live free from violence, discrimination, and exploitation. To that end, Equity Flex invests in innovative local organizations, helping them deepen their impact and build their capacity for social change. Together Equity Flex and its partners advance the rights of children and youth facing poverty and injustice and equip them with the tools and skills to reach their full potential.



This one belief guides us in everything we do at Equity Flex. It inspires us to grant life-changing wishes for children going through so much. It compels us to be creative in exceeding the expectations of every kid. It drives us to make our donated resources go as far as possible. Most of all, it's the founding principle of our vision to grant the wish of every eligible child,

Wishes are more than just a nice thing. And they are far more than gifts, or singular events in time.



kids, volunteers, donors, sponsors, medical professionals and communities. For kids, just the act of making their wish and dreams come true can give them the courage to comply with their medical treatments. Parents might finally feel like they can be optimistic. And still others might realize all they have to offer the world through volunteer work or philanthropy.

Kids need hope more than ever because many of their dreams and wishes have been delayed, they're having to wait even longer. But you can help! Making a

donation can grant even more waiting wishes as soon as we're able. Join our Messages of Hope movement to provide hope and encouragement to kids during this difficult time. For children diagnosed with critical illnesses, a wish come true can be a crucial



turning point in their lives. A wish can be that spark that helps these children believe that anything is possible and gives them the strength to fight harder against their illnesses. This impact is why we are driven to make every one of these wishes come true.

Many children and young people who have experienced domestic abuse do not get the support they need. How we help children and young people growing up is full of challenges but with a united effort we offer guidance, practical and emotional support. We do this in lots of different ways.

- Early years education that helps babies and toddlers learn and grow.
- Protection from neglect and abuse, and help so that children can overcome past experiences.

- Foster, adoption and residential services that provide safe, loving family homes.
- Support for disabled young people, which builds confidence and independence.
- Tackling mental health issues in children and young people.
- Positive conversations about mental health, including The Blues Programme, our emotional wellbeing course for teenagers.
- Giving young carers a break, so they can enjoy just being a child.
- Employability and life skills programmes that prepare young people for their life as adults.
- Campaigning so the voices of children and young people are heard.
- Provide for critically ill children especially cancer affected children.

## Our Impact

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Right now, Equity Flex is helping the most vulnerable children across the Globe, We work to change the lives of vulnerable children starting at an early age. We've been doing this for about 3years. We've learnt a lot in this time - gathering experience and expertise that we use every day in more than 475 local services, in schools, and online. We make a real difference by doing what's proven to work, and by coming up with new solutions. Last year, we reached 387,000 children, young people and families across the globe.

We make sure children get the best start in life. Our foster, adoption and modern residential services find children a loving home. We protect those who have been abused or neglected, and help children who care for others or find themselves homeless. Projects like the Blues Programme give young people the tools to look after their mental and emotional wellbeing.

We make an impact in so many ways. Here's some of the ways we helped children, young people and families last year:

**13,500**

The number of children we supported through nurseries, out-of-school clubs, children's centres, family centres and playgroups. That's parenting programmes, ante-natal support and breastfeeding advice; drop-in groups. Plus specialised help to address or prevent problems that may arise in the first years of a child's life.

**8,000**

The number of children and young people we helped to find a stable and loving home. We've protected them from domestic violence, self-harm and suicide; built warm and supportive relationships with parents

and carers; and helped them develop social skills and friendships. We've kept families together, or made sure children are cared for through fostering and adoption.

**11,000**

The number of children we've helped to improve their mental health in 2017/18. We've given support to young people who care for a family member, helped build practical life skills and friendships, turned around the lives of those who have committed a crime. Seventy-seven per cent of young people who took part in our Blues Programme showed an improvement in their mental health and wellbeing. We've also provided medical support to critically ill children suffering from cancer, heart problems and other severe ailments, we provide these kids with the best medical attention ranging from medical surgeries, to drug procurement and provision of essential needs..

### **Where your money goes**

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In 2018/19, your donations helped us reach more than 387,000 children, young people and families across the globe

Money raised by our incredible supporters – people like you – means we can protect and support more vulnerable and less privileged children

For every \$1 we spend, it goes directly towards helping children, young people and their families, and – with rising levels of poverty, abuse and neglect – this is vital.

We step in early to stop abuse and neglect, find loving foster and adoptive homes, support young carers, and help young people out of trouble and into education and employment.

# Why Invest with Equity Flex

## **SAFE AND SECURE:**

For years now, Equity Flex LLC has securely stored a fortune at our two escrow vaults.

## **FAST AND CONVENIENT:**

We offer custodianship to both new and existing clients. Our process are user friendly.

## **SIMPLIFY THE TRANSACTION:**

It's our job to sweat the small stuff, we make sure your asset is safeguarded from FRAUD while you work.

[www.equiflexx.com](http://www.equiflexx.com)

