

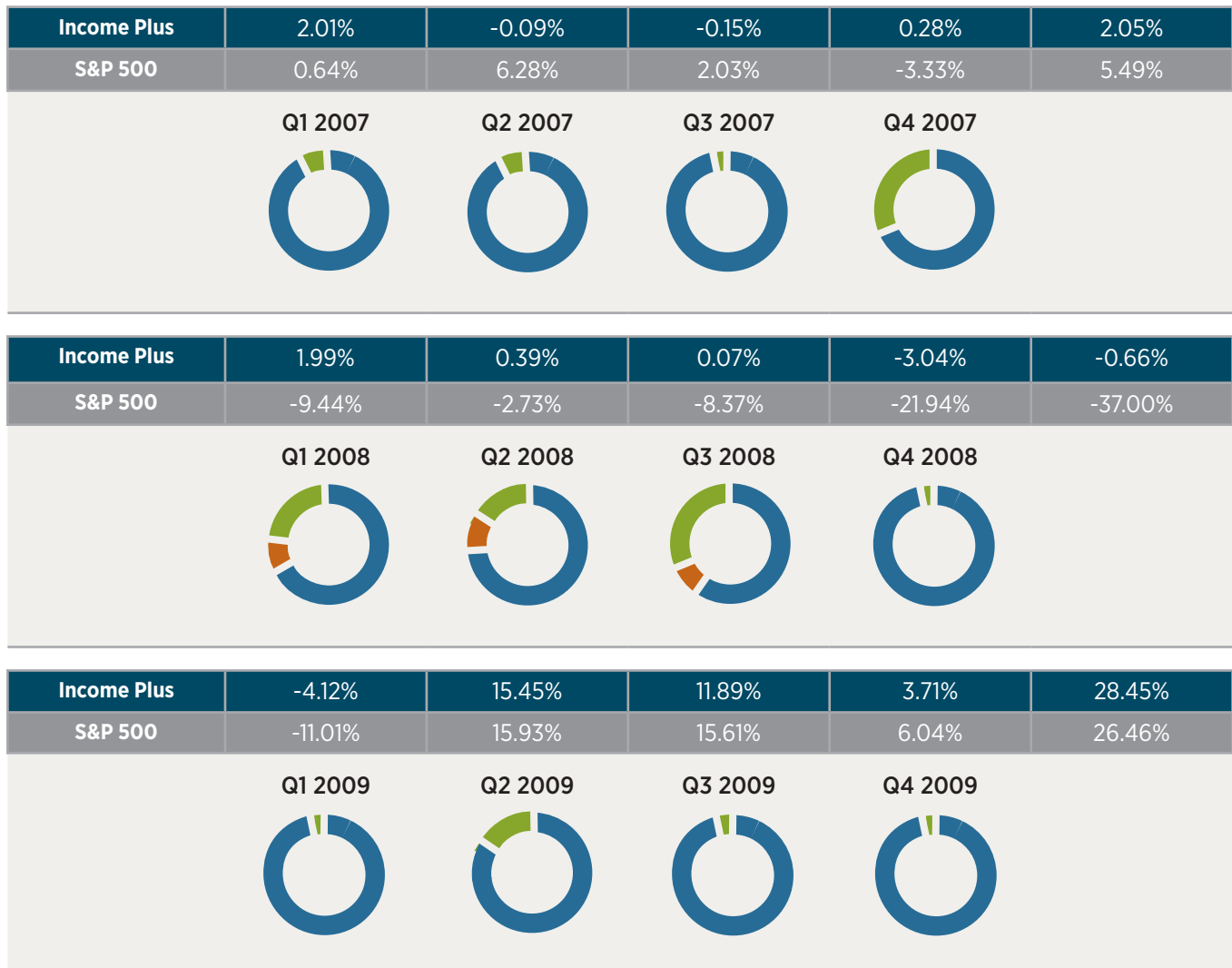
# INCOME PLUS



## Is your portfolio built to adjust to changing market conditions?

### Income Plus allocations 2007-2009

Supplemental material to be used in conjunction with Income Plus program sheet.

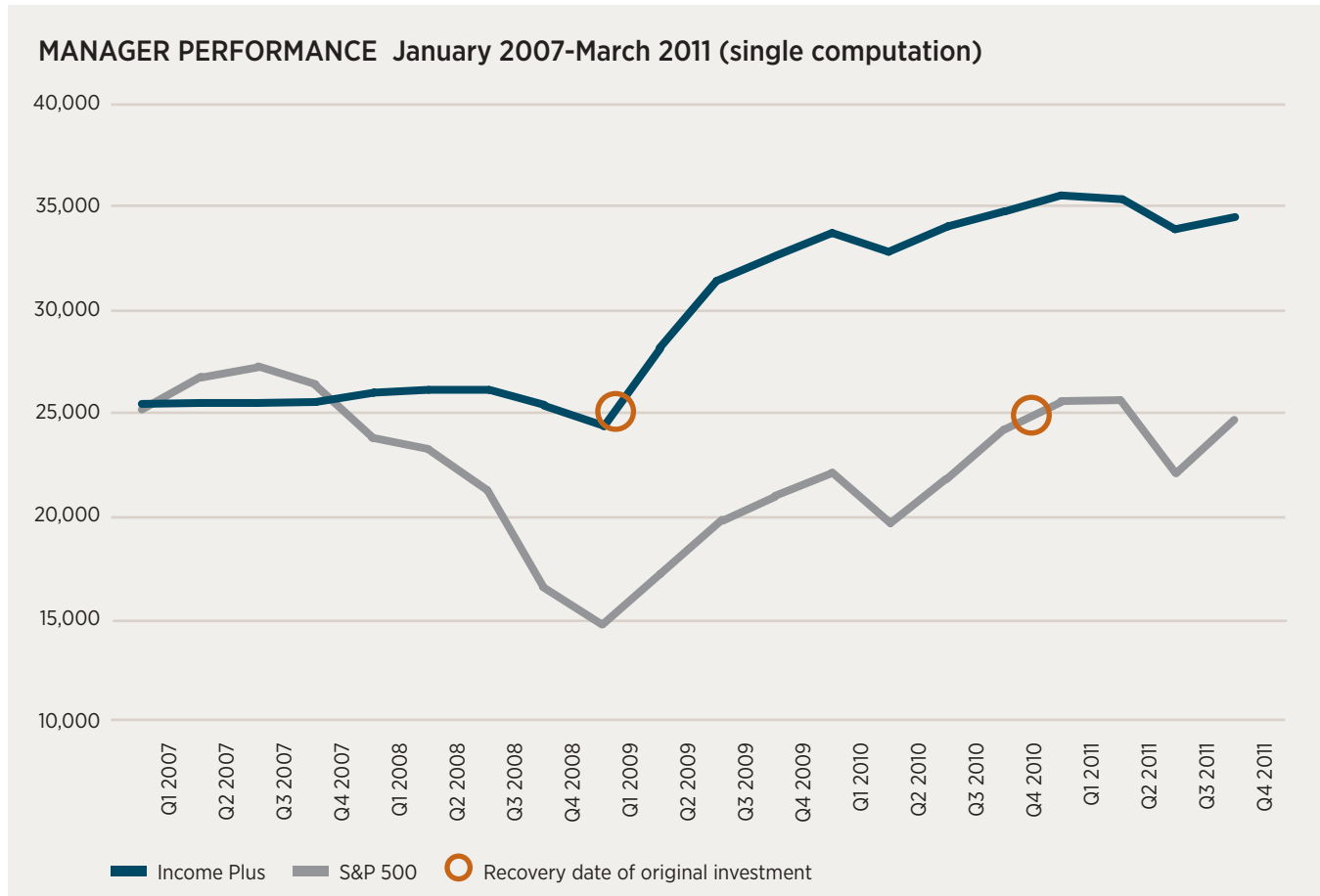


● Bonds ● Equities ● Cash

Weatherstone Capital Management, Inc. is a registered investment adviser with the U.S. Securities and Exchange Commission (SEC) under the Investment Advisers Act of 1940. The "firm" is defined as a third party money manager offering investment strategies in fee accounts primarily for U.S. clients. Client account minimums are \$25k to utilize Weatherstone Capital Management services without prior approval. The performance data quoted here represents past performance. Current performance may be lower or higher than the performance data quoted above. Investment return and principal value may fluctuate and may be worth more or less than the original cost. Past performance is no guarantee of future results. Performance information is based upon actual client accounts trading the strategy. Net returns are calculated using the highest management fee of 2% from inception to 12/31/2013 and 1.95% thereafter. Returns include the reinvestment of dividends. Calculations and returns are computed and stated in U.S. dollars. Each purchase and exchange in the managed accounts was at net asset value. Results shown are not intended to suggest that future results will be as good, or that the Income Plus program can guarantee an account against loss in declining markets. Average annual returns assume the reinvestment of all distributions and/or dividends. No allowances were made for income taxes. The inception date of Income Plus with Weatherstone Capital Management is 6/30/1996, but was offered under a different program name. Allocations shown are for each quarter end. Individual positions may have changed throughout the quarter, prior to quarter end. Risk metric calculations have been calculated using Zephyr StyleAdvisor. "Drawdown" may be defined as the peak-to-trough decline for a specific timeframe, of a fund, index, or model. "S&P 500" performance is based on the S&P 500 Total Return Index. The S&P 500 Total Return Index is an unmanaged, market capitalization weighted price index, composed of 500 widely held common stocks listed on the New York Stock Exchange, American Stock Exchange and Over-The-Counter (OTC) market, designed to track the weighted average of these 500 companies. The value of the index may vary with the aggregate value of the common equity of each of the 500 listed companies. The objective of the Income Plus strategy is to provide participation in various financial markets through a multi-asset/multiclass approach, at a reduced level of risk. The Income Plus and S&P 500 are illustrated for comparative purposes only and each represents varying degrees of risk. The dates shown were selected to illustrate the U.S. recession from December 2007-June 2009. Recession is defined as at least two consecutive quarters of declining gross domestic product (GDP) in the U.S.

The ebb and flow of the financial markets is something that we cannot control. However, the process used to address market fluctuations is something we can control, which can greatly impact one's quality of life leading up to or even throughout retirement.

**How long did you have to wait to get back to where you started?**



**Maximum Drawdown Q1 2007 - Q4 2009**

<b>Income Plus</b>	-7.03%
<b>S&amp;P 500</b>	-45.80%

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