GWN Securities, Inc.
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Annual Strategist Performance

Managed Advisory Platform (MAP) As of: 2025

Strategist	Model Name	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
AAMA	Aggressive Growth	14.27	15.81	16.19	-15.36	24.86	14.92	29.01	-6.77	22.81	5.56	-3.41	6.75	31.25
AAMA	Growth	14.54	15.21	14.50	-12.75	21.58	11.44	29.71	-7.10	18.57	3.83	-2.77	5.24	26.80
AAMA	Strategic Balanced	9.62	10.61	10.23	-10.29	12.79	7.91	19.24	-4.11	11.61	2.19	-2.07	2.75	13.84
AAMA	Global Aggressive Growth	14.10	13.69	16.66	-16.45	22.48	13.16	28.66	-7.95	25.78	4.87	-3.57	4.86	28.81
AAMA	Global Growth	14.44	13.31	15.33	-14.27	19.63	10.69	29.23	-8.16	22.20	3.37	-3.29	3.25	25.35
AAMA	Global Strategic Balanced	9.10	9.70	10.45	-11.03	11.59	7.49	18.97	-4.71	13.47	1.77	-2.21	2.06	13.09
Absolute Capital	Portfolio Protector Bond	7.32	6.88	6.71	-8.27	3.86	12.63	8.56	0.01	5.86	4.80	-2.34	0.67	-0.61
Absolute Capital	Portfolio Protector Multi-Fund	9.39	10.19	9.55	-10.32	9.35	4.84	7.83	-3.25	14.94	-1.38	0.69	-0.84	2.34
Absolute Capital	Asset Allocator Aggressive Growth	11.53	12.81	15.27	-17.00	17.87	10.16	17.61	-6.98	11.76	1.84	-0.19	4.77	19.08
Absolute Capital	Asset Allocator Growth	10.93	12.48	13.38	-16.12	16.44	6.00	14.95	-6.29	11.20	1.72	-0.78	4.45	17.98
Absolute Capital	Asset Allocator Conservative	10.35	11.98	11.37	-15.35	15.18	10.57	8.13	-4.59	7.69	3.50	-3.09	2.64	12.33
Absolute Capital	Asset Allocator Core	10.54	12.25	12.89	-16.11	16.02	7.71	10.09	-6.74	9.53	2.75	-1.64	3.72	15.41
Absolute Capital	Asset Allocator Income	10.18	11.72	10.41	-14.55	14.24	11.73	7.71	-2.80	6.80	4.19	-4.03	3.08	9.10
American Funds	Conservative Growth and Income Model	13.01	9.37	9.54	-8.39	13.10	5.45	15.87	-0.61	11.77	9.96	-2.31	7.30	14.22
American Funds	Conservative Income Model	9.69	5.36	5.94	-7.71	5.41	7.83	8.93	-0.84	5.75	3.72	0.47	4.51	4.55
American Funds	Global Growth Model	20.40	15.33	24.21	-25.09	12.76	26.59	27.64	-8.64	27.53	5.46	2.35	3.70	27.13
American Funds	Growth and Income	17.54	14.93	18.63	-14.94	15.98	15.83	21.71	-5.81	19.10	8.98	-0.08	8.10	23.48
American Funds	Growth Model	19.68	20.64	28.72	-26.30	18.28	24.58	26.80	-6.25	24.79	9.08	2.07	7.82	31.50
American Funds	Moderate Growth	19.40	18.43	24.13	-20.74	17.21	18.62	24.53	-5.86	21.91	10.16	1.05	8.34	28.62
American Funds	Moderate Growth and Income	15.96	12.25	13.91	-12.71	13.86	13.25	19.36	-4.56	16.50	6.94	0.06	6.26	18.94
American Funds	Preservation Model	6.14	4.01	4.41	-5.35	-0.31	5.74	4.07	1.06	1.14	1.29	0.89	1.54	-0.64
American Funds	Retirement Income Model Conservative	12.35	7.25	7.11	-9.49	8.92	8.09	13.26	-0.71	9.22	6.18	-0.41	6.94	8.57
American Funds	Retirement Income Model Enhanced	16.37	12.08	11.93	-10.44	14.81	6.80	17.76	-0.99	13.98	8.76	-1.34	7.75	17.05
American Funds	Retirement Income Model Moderate	14.83	9.53	9.45	-9.52	12.21	7.35	15.40	-0.61	11.51	7.56	-0.77	7.46	12.77

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Strategist	Model Name	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
BlackRock Funds	Multi Asset Income Conservative	10.04	5.87	16.92	-1.93	6.20	8.49							
BlackRock Funds	Multi Asset Income Moderate	12.77	6.91	21.01	0.65	9.08	6.30							
BlackRock Funds	Multi Asset Income Moderate Growth	15.13	7.38	18.52	-7.34	12.08	-12.46							
BlackRock Funds	Strategic ETF 100/0	19.66	19.07	22.36	-16.14	15.95	14.58							
BlackRock Funds	Strategic ETF 60/40	16.15	12.60	15.82	-14.60	10.45	11.83							
BlackRock Funds	Strategic ETF 80/20	18.77	16.08	19.02	-14.55	13.38	13.39							
BlackRock Funds	TI Aggressive Income	38.00	7.50	9.67	-12.43	-0.46	0.40							
BlackRock Funds	TI Core Income	6.09	7.34	5.51	-4.80	0.44	1.53							
BlackRock Funds	TI High Income	46.78	7.56	8.35	-12.42	-0.02	0.49							
BlackRock Funds	TI Moderate Income	25.22	7.00	6.87	-10.26	-0.31	1.77							
Castellum Asset Mgt	Select Conservative	7.75	9.93	10.16	-13.91	4.52	11.10	9.46	-0.95	7.25	4.14	-1.31	4.20	7.30
Castellum Asset Mgt	Select Balanced	6.86	11.75	11.94	-14.20	8.43	12.59	13.68	-2.33	11.61	6.82	-3.37	4.40	12.70
Castellum Asset Mgt	Select Moderate	8.08	14.14	13.34	-16.19	11.27	15.88	17.20	-3.42	15.12	6.14	-3.06	5.49	17.59
Castellum Asset Mgt	Select Growth Appreciation	7.55	16.57	16.26	-17.38	14.79	18.48	21.94	-4.42	18.05	6.14	-2.84	5.84	19.76
Castellum Asset Mgt	Select Maximum Appreciation	7.83	20.26	21.26	-17.55	17.97	20.39	25.69	-5.46	19.97	7.90	0.33	5.94	25.85
Castellum Asset Mgt	Strategic ETF Conservative	9.80	6.11	10.13	-13.63	4.66	7.08	12.13						
Castellum Asset Mgt	Strategic ETF Balanced	12.13	9.69	12.30	-13.48	10.41	8.17	16.19						
Castellum Asset Mgt	Strategic ETF Moderate	13.51	12.64	14.55	-13.94	14.82	9.74	19.22						
Castellum Asset Mgt	Strategic ETF Growth	14.91	15.52	19.04	-16.31	17.97	12.09	21.82						
Castellum Asset Mgt	Strategic ETF Max Appreciation	16.56	16.97	20.91	-13.06	22.06	12.96	25.81						
Castellum Asset Mgt	Dynamic ETF Conservative	11.41	5.59	8.15	-12.08	4.21	6.44	9.94						
Castellum Asset Mgt	Dynamic ETF Balanced	12.34	6.97	10.38	-12.22	11.16	7.62	13.03						
Castellum Asset Mgt	Dynamic ETF Moderate	14.36	7.66	12.80	-11.88	11.69	8.87	16.33						
Castellum Asset Mgt	Dynamic ETF Growth	16.30	9.61	13.79	-12.00	16.44	9.78	19.00						
Castellum Asset Mgt	Dynamic ETF Max Appreciation	16.70	10.98	16.00	-12.80	22.60	10.43	21.02						
Castellum Asset Mgt	Tactical ETF Flexible Strategy	22.38	6.30	1.96	-8.73	8.19	7.38	2.52						

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Strategist	Model Name	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
Castellum Asset Mgt	Vanguard Conservative	9.55	6.69	7.50	-9.06	3.86	6.82	10.00						
Castellum Asset Mgt	Vanguard Balanced	11.18	8.76	9.47	-9.83	8.91	7.76	12.90						
Castellum Asset Mgt	Vanguard Moderate	13.72	12.47	15.76	-10.76	12.44	8.99	17.09						
Castellum Asset Mgt	Vanguard Growth Appreciation	15.66	15.90	19.50	-11.11	17.10	10.24	21.13						
Castellum Asset Mgt	Vanguard Maximum Appreciation	17.25	15.91	19.67	-12.28	18.68	12.69	24.80						
Clark Capital	Multi Strategy 25-75	New												
Clark Capital	Multi Strategy 50-50	New												
Clark Capital	Multi Strategy 75-25	New												
Clark Capital	Navigator Global Risk Managed Conservative	New												
Clark Capital	Navigator Global Risk Managed Moderate	New												
Clark Capital	Navigator Global Risk Managed Growth	New												
Clark Capital	Navigator Fixed Income Total Return	New												
Donoghue Forlines	DF Income	4.05	5.70	8.03	-6.84	3.14	-0.25	6.15	-0.24	2.31	6.73	-1.55	-0.19	5.67
Donoghue Forlines	DF Dividend & Yield	10.36	9.12	8.79	-10.03	8.94	-2.64	8.80	-4.48	5.19	5.79	-1.93	4.95	8.63
Donoghue Forlines	DF Growth & Income	13.28	12.72	11.79	-13.92	14.51	-4.00	10.16	-6.26	8.13	8.47	-3.50		
Dimensional Funds	Core Plus Wealth 0/100	4.66	5.69	5.33	-4.44									
Dimensional Funds	Core Plus Wealth 100/0	19.66	14.74	19.59	-11.32									
Dimensional Funds	Core Plus Wealth 20/80	8.47	6.56	8.35	-8.76									
Dimensional Funds	Core Plus Wealth 40/60	11.86	8.25	11.17	-10.46									
Dimensional Funds	Core Plus Wealth 60/40	14.70	10.17	14.17	-12.00									
Dimensional Funds	Core Plus Wealth 80/20	17.08	12.49	16.85	-13.45									
Dimensional Funds	Core Wealth 0/100	4.62	5.80	5.32	-2.93									
Dimensional Funds	Core Wealth 100/0	20.41	15.84	20.30	-14.79									
Dimensional Funds	Core Wealth 20/80	8.17	7.45	8.20	-6.65									
Dimensional Funds	Core Wealth 40/60	12.05	8.64	11.29	-10.42									
Dimensional Funds	Core Wealth 60/40	15.76	9.98	14.88	-13.69									
Dimensional Funds	Core Wealth 80/20	17.83	13.33	17.93	-14.23									

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Strategist	Model Name	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
First Trust	Alternatives Model	New												
First Trust	FT VEST Laddered US Equity Buffer ETF Model	New												
Frontier	Absolute Return	9.26	3.74	4.02	-6.08	1.69	2.51	8.39	-1.80	5.48	3.67	-2.44	4.32	1.13
Frontier	Focused Opportunities	25.74	3.92	10.09	-20.24	3.28	15.26	20.92	-8.68	23.85	3.84	-6.31	4.15	8.15
Frontier	Absolute Return Plus	15.73	4.03	4.71	-19.70	4.35	6.74	15.21	-6.52	14.32	4.90	-6.49	6.15	4.17
Frontier	Global Opportunities	18.70	9.19	14.35	-18.83	15.71	15.24	22.96	-7.47	22.52	9.06	-4.71	3.78	23.81
Frontier	Balanced	15.55	7.85	10.25	-14.11	7.22	8.37	15.98	-3.50	13.85	5.76	-3.28	4.73	8.74
Frontier	Conservative Mutli-Asset Income	9.54	5.49	10.97	-7.57	5.15	4.38	9.34	-1.88	7.75	6.14	-4.23	2.23	1.55
Frontier	Long-Term Growth	19.56	9.03	13.98	-17.30	15.48	8.79	20.90	-5.13	19.90	6.93	-4.42	6.10	16.92
ICON Advisers	US Moderate	10.67	9.66	11.14	-9.43	16.55	9.92	22.42	-8.39	10.87	10.35	-3.64	4.13	14.17
ICON Advisers	US Growth	13.80	10.02	13.42	-13.64	23.00	13.24	33.58	-16.52	20.09	12.55	-7.35	5.22	25.38
ICON Advisers	US Income	9.10	8.85	4.56	-6.53	11.88	3.97	14.70	-1.29	6.43	11.02	-2.10	8.09	5.48
ICON SBI	Global Conservative	7.45	11.91	11.71	-12.88	6.13	14.18	14.98	-4.25	9.54	3.13	1.58	3.90	
ICON SBI	Global Growth	13.79	13.73	14.72	-23.83	9.05	36.72	27.19	-8.68	23.91	5.59	1.19	7.79	
ICON SBI	Global Moderate	11.32	11.18	13.03	-18.57	7.39	26.94	21.39	-5.63	17.44	5.23	0.62	5.40	
Main Management	Active Sector Rotation ETF	17.38	18.24	19.77	-12.59	26.38	14.26	28.48	-9.20	22.03	10.79	1.96	15.05	31.10
Main Management	BuyWrite Hedged Equity Strategy	8.96	10.36	11.92	0.80	9.66	13.99	14.30	-5.40	10.29	2.88	4.63	5.53	11.64
Ocean Park	Tactical Bond	1.43	6.92	7.50	-4.11	0.82	7.69	9.85	-0.14	4.85	10.21	-3.73	-1.01	5.90
Ocean Park	Conservative	4.28	7.70	4.41	-5.02	1.00	7.23	8.29	-2.69	6.86	3.89	-2.33	3.96	-1.21

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Strategist	Model Name	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
Russell Core	Conservative	9.36	3.93	8.05	-14.12	3.16	7.01	9.51	-1.71	6.27	4.63	-1.51	4.13	2.29
Russell Core	Moderate	11.54	5.96	10.80	-15.08	6.92	8.89	12.31	-3.87	9.85	6.18	-1.94	4.66	5.84
Russell Core	Balanced	14.56	9.40	14.46	-16.70	10.51	10.37	15.73	-6.73	13.69	6.69	-2.77	4.41	11.30
Russell Core	Growth	17.01	11.60	17.73	-17.65	14.03	11.13	18.89	-9.20	17.90	8.10	-3.58	3.44	15.47
Russell Core	Equity Growth	19.20	13.02	19.86	-18.70	16.94	12.40	21.62	-11.11	21.36	9.58	-4.31	3.12	19.10
MultiMarket Portfolios	Multi-Market Portfolios Balanced	12.28	12.84	12.41	-9.70									
MultiMarket Portfolios	Multi-Market Portfolios Balanced Growth	14.67	14.88	15.24	-11.36									
MultiMarket Portfolios	Multi-Market Portfolios Balanced Income	9.71	10.43	9.46	-7.65									
MultiMarket Portfolios	Multi-Market Portfolios Income	New												
TOEWS	Hedged Capital Preservation	5.15	4.96	5.73	-6.44	0.15	9.16	8.50	-3.27	4.99	2.67	-3.94	0.57	6.47
TOEWS	Hedged Balanced	11.09	4.09	8.76	-8.91	-0.36	16.38	10.12	-5.29	11.64	-0.94	-6.32	-1.84	14.06
TOEWS	Hedged Growth	14.40	3.96	10.65	-10.19	-0.42	20.42	11.31	-6.77	14.51	-3.34	-7.36	-2.46	18.98
TOEWS	Hedged Equity	15.04	2.58	11.22	-11.36	-0.79	25.75	11.67	-9.05	14.93	-6.13	-9.64	-3.18	23.83
TOEWS	Defensive Alpha - Equity	10.91	6.56	7.93	-15.98	12.48	16.27	21.92	-7.00	15.58	4.41	1.70		
TOEWS	High Income	3.64	5.98	4.72	-5.32	0.37	5.41	7.32	-0.88	3.44	7.19	-2.09	0.40	4.47
TOEWS	Managed Risk Blueprint	11.76	12.18	8.20										
Vanguard Core Series	Core Balanced ETF 40/60	12.60	7.54	12.35	-14.71	6.69	8.71	14.44	-2.58	10.99	5.73	-0.11	6.78	9.09
Vanguard Core Series	Core Balanced ETF 60/40	16.18	10.42	15.47	-15.78	10.84	10.71	18.20	-4.75	15.00	6.97	-0.59	6.95	14.94
Vanguard Core Series	Core Growth ETF 100/0	22.89	16.09	21.68	-17.73	18.18	14.37	25.53	-8.68	23.29	9.32	-1.73	7.17	27.29
Vanguard Core Series	Core Growth ETF 80/20	19.41	13.24	18.44	-16.79	14.65	12.57	21.85	-6.69	19.12	8.17	-1.13	7.07	21.00
Vanguard Core Series	Core Income ETF 0/100	5.79	2.04	6.51	-12.68	-2.39	4.66	7.01	0.80	3.24	3.14	0.64	6.39	-1.92
Vanguard Core Series	Core Income ETF 20/80	9.34	4.95	9.44	-13.74	2.54	6.82	10.79	-1.02	7.07	4.46	0.30	6.60	3.48

Advisory Disclosures:

This returns data is indicative of directly held accounts of the money managers shown prior to 2019. Starting 2019 forward the returns are based upon seed accounts. Your individual performance may vary based upon many factors including but not limited to fees etc. Please see your Financial Advisor for your specific fee schedule and individual performance. The performance reports represent purely historical data. Past performance is never a guarantee of future results. There may be economic times where all investments are unfavorable and depreciate in value. The portfolios' underlying investments fluctuate in price and may be sold at a price lower than the purchasing price. The investment instruments used in these portfolios are neither FDIC insured nor guaranteed by the US Government.

There may be performance returns which consist of back-tested data that reflect the theoretical performance investors would have obtained had they invested in the manner shown and does not represent returns actually obtained. Back-testing is done by retroactively applying a hypothesis to the historical data to obtain returns (scientific method) or finding variables in historical data that correlate to returns and developing a hypothesis from the historical data (data mining) or applying any hypothesis to different time periods until favorable returns are discovered (data mining). Back-tested models are developed with the benefit of hindsight but might not have foresight of the future.

No representation is being made that any client will or is likely to achieve results similar to those presented herein.

Advisory Services offered through **GWN Securities, Inc.**, a Registered Investment Advisor
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