



Portfolio Trade Alert - January 9, 2023

Trade Alert For Equity And ETF Models

We are starting to rebalance our account models for the New Year. We are bringing Public Storage up to model weight in the equity model. In the ETF model, we are rebalancing our Lithium ETF (LIT) to model weight and adding to the S&P 500 Value ETF (VYM).

With the market improving to start the new year, we will look to add equity exposure after Jerome Powell's speech tomorrow.

Equity Model

- *Bring PSA to 1.5% of the total portfolio value.*

ETF Model

- *Increase LIT to 2% of the total portfolio weight.*
 - *Add to VYM and increase the weight to 4% of the total portfolio.*
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