The WealthPlan LLC
FOUR SEASONS OF FINANCIAL PLANNING

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The WealthPlan LLC



GROW

Core Stock Offense

How Core Stock Offense fits into a diversified portfolio.

Why Core Stock Offense Matters

Offense is one of our three Core Stock strategies, built to aim for more growth. It leans into innovation, technology, newer companies and rising stocks. The goal is more upside over time. The price is a bumpier ride.

> Offense includes the **Nasdaq 100**, which leans heavily toward technology, so it tends to grow faster in good years and fall harder in bad ones.

What This Strategy Includes

Domestic 90%

Disruption
Companies reshaping how industries work

Exponential Technology
AI, automation and other fast-moving fields

IPO Investing
Recently public companies in their early growth years

Mid-Small Inclusion
Smaller companies big indexes miss

Momentum
Stocks already on the rise

NASDAQ
The Nasdaq's 100 biggest companies

Option Income
Earns extra income from the stocks it owns

International 10%

International
Growth opportunities outside the U.S.

Benefits and Tradeoffs

Benefits

- **Higher growth potential.** Aims for more upside than the broad market.
- **Access to innovation.** Owns the companies shaping what's next.
- **Added income.** Option income adds cash flow, in exchange for some upside in big rallies.

Tradeoffs

- **Bigger swings.** Expect sharper drops than the S&P 500 in bad markets.
- **Higher cost.** Specialized ETFs cost more than broad index funds.
- **Not for everyone.** Investors who need their money soon, or who lose sleep over sharp drops, may prefer Standard or Defense.

Strategy Specifics

ETFs	0.34%	8	Daily
FUND TYPE	EXPENSE RATIO	HOLDINGS	LIQUIDITY

Returns by Decade

Offense blends many different strategies, so no single index is suitable to use to gauge historical performance.

How This Fits Your Plan

Depending on your risk tolerance, I typically put up to roughly 75% of a portfolio into our Core Stock strategies. Our framework starts with 60% Standard, 20% Defense, and 20% Offense.

Curious whether Core Stock Offense belongs in your portfolio? Let's talk!

Book Time With David

Call or Text David at (516) 400-7111

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All strategy data is as of September 2026 and is subject to change.

Statistics and fund data are drawn from publicly available third-party industry sources, including data accessed via Koyfin, and are believed to be reliable but not guaranteed. Any allocation guidance shown is general and is not a recommendation for any individual investor. Artificial intelligence tools assisted with research, compilation, and presentation of certain data; AI-generated information may contain errors and was reviewed against third-party sources, which remain the original source of any data shown.

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