

# Truist Wealth Investment Philosophy

Our investment philosophy is rooted in a disciplined approach, guided by evidence-based strategies, and focused on maintaining portfolios that align with each client's values, goals, and time horizon.

## We stay anchored and filter out the noise.

A disciplined approach enables us to make prudent choices, help manage risks, and commit to your long-term financial plan over different market cycles.

Having a disciplined and stable foundation can help you weather market disruptions.

## We build portfolios with ideas and strategies that matter.

Understanding the risk/return tradeoff is essential to achieving your investment goals.

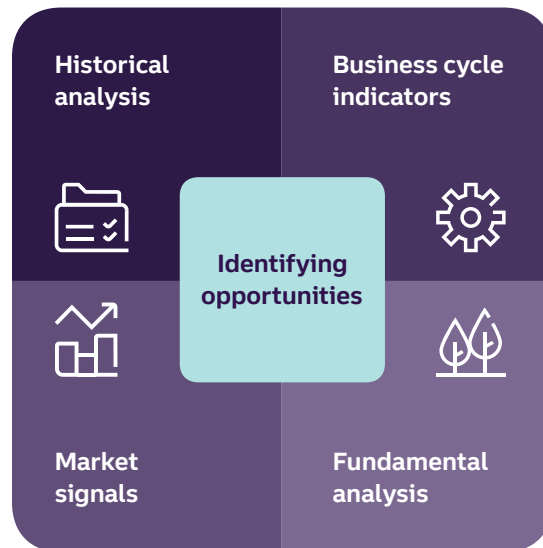
Simplifying the opportunity set helps us narrow the focus of your specific needs.

Alternative investments can improve portfolio outcomes for qualified investors.

## Lead with evidence to form an actionable point of view.

As markets evolve, so should your investment advice.

Business cycle indicators guide our stance on overall portfolio posture.



**Your team leverages our vast resources to deliver advice. You're at the core of our business. Your team delivers the overall wealth experience by leveraging our deep resources and experience to suit your financial goals.**

### Wealth solutions:

- Banking
- Investment Advisory Services
- Advice and Planning
- Trust and Estate Planning
- Center for Family Legacy
- Foundations and Endowments Specialty Practice

Alternative strategies are not suitable for all investors. Many alternative strategies use sophisticated and aggressive techniques. Certain alternative strategies may be tied to hard assets such as commodities, currencies and real estate and may be subject to greater volatility as they may be affected by overall market movements, changes in interest rates of factors affecting a particular or currency, and international economic, political, and regulatory developments.

Investment and insurance products: Are not FDIC or any other government agency insured | are not bank guaranteed | may lose value

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