

# Cardinal Wealth Management Growth Strategy

As of 6/30/2020

## Investment Objective

The Cardinal Wealth Management Growth Strategy seeks to provide investors long-term capital appreciation in a diversified portfolio of companies with extraordinary earnings growth.

## Strategy Overview

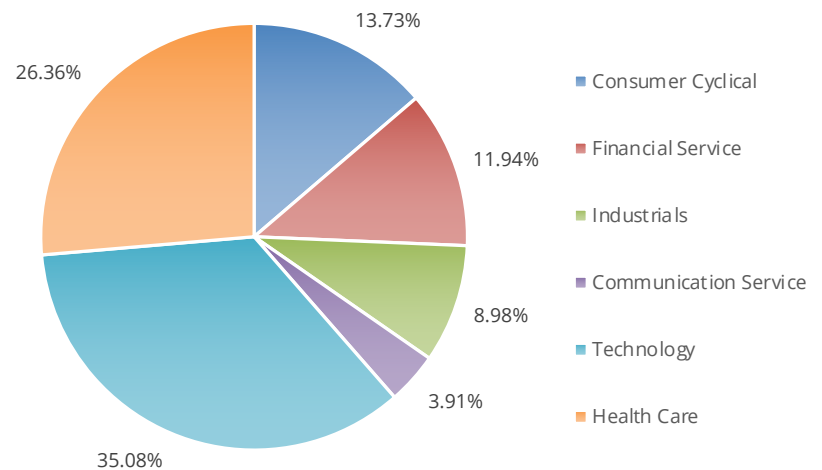
The Cardinal Wealth Management Growth Strategy searches for companies with the following characteristics; 1) high current and annual earnings growth, 2) exceptional historical return on equity, 3) companies that are leaders in their industry, 4) new innovation, leadership and/or positive cultural change, and 5) high institutional sponsorship (banks, endowment funds, pension funds, etc.) of share volume and ownership. The strategy attempts to deliver attractive performance in bull markets, but is inherently more volatile than a value oriented strategy due to the fact that it's seeking higher growth. The fund often buys companies that are trading at higher multiples with expectations to continue or accelerate their current growth rates.

## Top 5 Holdings

Security Descriptions	Ticker	Portfolio Weighting
Splunk Inc	SPLK	7.29%
Trade Desk	TTD	6.04%
Visa Inc	V	5.55%
Apple Inc	AAPL	5.42%
Thermo Fisher Scientific	TMO	5.39%

\*Holdings and Sector Weightings are subject to change.

## Portfolio Sector Weighting



### Disclosure:

Spire Wealth Management is a Federally Registered Investment Advisory Firm. Securities offered through an affiliated company, Spire Securities, LLC a Registered Broker/Dealer and member FINRA/SIPC

Mike Jacobs of Cardinal Wealth Management is an Investment Advisor Representative of Spire Wealth Management, LLC, a Federally Registered Investment Advisor and a Registered Representative of Spire Securities, LLC an SEC Registered Broker/Dealer and Member of FINRA and SIPC.

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