



PARKVIEW PARTNERS
CAPITAL MANAGEMENT

Parkview Partners Capital Management Named to PSN Top Guns List of Best Performing Strategies

Quarterly PSN Top Guns List published by Zephyr identifies best-in-class separate accounts, managed accounts, and managed ETF strategies.

Columbus, Ohio — February 21, 2024— Parkview Partners Capital Management announced today it has been named to the *PSN Top Guns List* of best performing separate accounts, managed accounts, and managed ETF strategies for Q4 2023. The publisher Zephyr is used as reference for investors and asset managers.

“With the growing interest in separately managed accounts, the PSN Top Guns List has attracted greater attention,” says Margaret Tobiasen, SVP of Data Distribution who cites PSN’s pioneering efforts as the first SMA database as the reason for the list’s popularity. “Parkview Partners Capital Management has done remarkable work, and we are pleased to include them.” Through a combination PSN’s proprietary performance screen, the PSN Top Guns List ranks products in six proprietary categories in over 75 universes based on continued performance over time.

Parkview Partners Balanced investment philosophy (Strategic Growth) is based on the knowledge that asset allocation is the prime determinant of investment returns. The philosophy emphasizes long-term time horizons and the avoidance of emotional reactions. The firm’s balanced asset allocation strategy combines the three major asset classes (stocks, bonds, and cash) based upon anticipated long-term capital market returns. Portfolios are constructed in a manner that is consistent with client investment objectives, time horizons, cash flow requirements, acceptance of risk (volatility), and other important factors.

Parkview Partners Capital Management strategy was named Top Gun 4 Star rating, meaning our Strategic Growth strategy had an r-squared of 0.80 or greater relative to the style benchmark for the recent five-year period. Moreover, the strategy’s returns exceeded the style benchmark for the three latest three-year rolling periods. The top ten returns for the latest three-year period then become the 4 Star Top Guns.

Parkview Partners Capital Management is providing active management and other advisory services to clients throughout the United States. The practice is staffed by experienced financial advisory professionals and supported by relationships with global investment research firms such as Evercore ISI, Yardeni Research and JPMorgan Chase & Co. Parkview’s mission is to unite a tax-efficient, consistent, objective, disciplined and repeatable wealth management process with a high level of personal service and communication.

For nearly four decades, [PSN](#) has been a top resource for investment professionals. Asset managers rely on Zephyr’s PSN to effectively reach institutional and retail investors. Over 2,800 firms, 285 universes, and more than 21,000 products comprise the PSN SMA database showing asset breakdowns, compliance, key personnel, ownership diversity, ESG, business objectives and strategy, style, fees, GIC sectors, fixed income ranges and full holdings. Unique to PSN is its robust historical database of **nearly 40 Years of Data Including Net and Gross-of-Fee Returns**. For more details on the methodology behind the PSN Top Guns Rankings or to purchase PSN Top Guns Reports, contact Robby Resendez at PSNdata@informais.com Visit [PSN online](#) to learn more.

Third-party rankings and recognition from rating services or publications are no guarantee of future investment success. Working with a highly rated advisor does not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor or by any client nor are they representative of any one client's evaluation. Generally, ratings, rankings and recognition are based on information prepared and submitted by the advisor. Unless otherwise noted, no fee was paid for consideration of any ranking or award.

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