Symphony Wealth Management Group’s Ovation Fund Blazes New Trails on the Efficient Frontier and the Utilization of ETFs

ATLANTA, GA (SEND2PRESS NEWSWIRE) — The Symphony Wealth Management Group, LLC, (www.SymphonyWealth.com) today announced the launch of their new Ovation Fund, a dynamic asset allocation fund which utilizes Exchange Traded Funds (ETFs) as its underlying holdings. The Ovation Fund is managed by Dr. William Breen.

Dr. William Breen is Emeritus Professor at The Kellogg School of Management at Northwestern University where he served as Chairman of the Finance Department, Head of Doctoral Studies, and published numerous papers, articles and books. Dr. Breen currently provides ETF portfolio strategist services to approximately 300 million dollars of assets.

“For years experts have told us that asset allocation is the most important determinant of a portfolio’s performance, yet it can be difficult to assess proper positioning with static allocation models and hard-to-control allocation exposures with traditional mutual funds,” said Dr. Breen, the Ovation Fund’s Chief Portfolio Manager. “With the Ovation Fund, we’ve combined the power of a dynamic asset allocation framework to take advantage of changing market conditions, with the exceptional control that ETFs provide, and have created an investment strategy that we believe gives investors a better opportunity to realize the efficient frontier we’ve all heard so much about.”

Dr. Breen and The Ovation Fund management team provide active asset allocation management through a mutual “fund of funds” strategy, utilizing Exchange Traded Funds rather than traditional mutual funds as building blocks. Combined with Breen’s renowned approach to sound investment strategies based on good discipline, institutional asset management and academic financial economics, the Ovation Fund offers clients a dynamically managed and well diversified portfolio which is breaking new ground on the efficient frontier.

Dr. Breen’s management team includes James T. Breen, Portfolio Manager, and Christopher S. Bach, Founder of The Symphony Wealth Management Group. Previously, James T. Breen served as Senior Vice President with LCG Associates, an Atlanta-based pension fund consulting firm, and as Senior Vice President at Disciplined Investment Advisors. Christopher S. Bach has over 20 years experience in Financial Services and Wealth Management, and has served as a Managing Vice President for USAllianz, Director of National Development for Triad Advisors, and Vice President of Shearson/Lehman Brothers.

For more information about the Ovation Fund please visit www.SymphonyWealth.com

Disclaimer: You should carefully consider the investment objectives, potential risks, management fees, and charges and expenses of the Fund before investing. The Fund’s prospectus contains this and other information about the Fund, and should be read carefully before investing. You may obtain a current copy of the Fund’s prospectus by calling 1-877-328-1168 or by downloading one at http://www.symphonywealth.com/. Past performance is no guarantee of future results. Your Fund shares, when redeemed, may be worth more or less than their original cost. Distributed by Unified Financial Securities, Inc., 431 N. Pennsylvania Street, Indianapolis, IN 46204.

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