LAFFER TENGLER INVESTMENTS

Income Strategies

Distinctive approaches. Shared investment discipline.

Laffer Tengler's income strategies offer different approaches to generating income and managing investment risk. Each combines disciplined analysis, security selection and ongoing portfolio oversight, with an emphasis on the client's investment objectives.

Across the lineup, the team applies these disciplines differently, from actively managed fixed-income investments and individually selected taxable or tax-exempt bonds to a flexible strategy designed to respond to changing inflation conditions.

Three Strategies. Three Distinct Roles.



Fixed Income

Current income pursued through active ETF allocation across duration, sectors and credit quality.



Bespoke Bond Portfolios

Individually selected taxable or tax-exempt bonds managed for current income and risk.



Dynamic US Inflation

Flexible multi-asset exposure designed to respond as inflation conditions evolve.

Three Income Approaches

Different objectives. A consistent, disciplined process.

Each of our income strategies is designed to address a different portfolio objective, while sharing a common foundation of disciplined analysis, thoughtful security selection and ongoing portfolio review.



Fixed Income

Current income pursued through active ETF allocation across duration, sectors and credit quality.

PRIMARY EMPHASIS

Current income + active allocation

WHAT DISTINGUISHES IT

Uses income ETFs to actively adjust portfolio duration, sector exposure and credit quality as market conditions and investment opportunities change.

WHERE IT CAN FIT

Designed to provide current income and diversification through actively managed income exposure, with flexibility to adjust as market conditions change.



Bespoke Bond Portfolios

Individually selected taxable or tax-exempt bonds managed for current income and risk.

PRIMARY EMPHASIS

Individual bonds + current income

WHAT DISTINGUISHES IT

Individually selected taxable or tax-exempt bonds are evaluated for credit quality, income, maturity, call provisions and price, with an emphasis on current income and risk management.

WHERE IT CAN FIT

Designed to provide taxable or tax-exempt income and diversification within a broader investment portfolio.



Dynamic US Inflation

Flexible multi-asset exposure designed to respond as inflation conditions evolve.

PRIMARY EMPHASIS

Inflation response + flexible allocation

WHAT DISTINGUISHES IT

Combines quantitative models, qualitative research and macroeconomic and financial data to adjust ETF-based positioning as inflation conditions evolve.

WHERE IT CAN FIT

Designed to complement traditional bond portfolios with a flexible approach to changing inflation conditions.

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Disclosure Information

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All investments involve risk, including the possible loss of principal. Different types of investments involve varying degrees of risk, and there can be no assurance that any investment or investment strategy will be successful or profitable. There is no guarantee that any investment objective will be achieved. Past performance is not indicative of future results.

LTI's market views and opinions are current only as of the date presented and are subject to change without notice. Changes in market conditions or outlook may result in changes to portfolio holdings and characteristics.

Supporting documentation for any claims or statistical information is available upon request.