

# THE GRAND TETON ESG MODEL

#### **Investment Objectives: Growth**

The Grand Teton ESG strives to provide long-term capital appreciation for investors seeking to assume a moderate to high level of risk. This portfolio provides exposure to over 2,300 stocks in U.S., foreign developed, and emerging markets. A modest allocation to fixed income provides diversification and exposure to more than 2,500 U.S. Government and corporate bonds. As part of the Concord IMPACT Model Portfolio Series, Teton ESG leverages ETFs for cost savings and tax efficiency.

#### **Model Details**

Management Fee:	0.25%
Blended Fund Expense Ratio:	0.31%
Total Expense:	0.56%
Portfolio Manager:	Gary Aiken

3% Real Estate

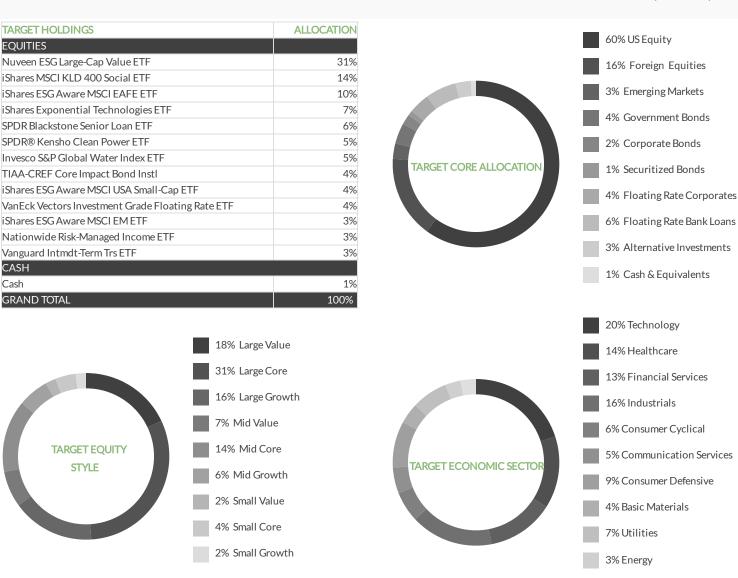
### **Target Risk Profile**

For illustrative purposes only.

Low Risk

High Risk

Last updated on July 31, 2022



## Additional ESG Strategies: Maximum Growth, Aggressive Growth, Moderate Growth, Moderate & Balanced.



# Gary Aiken | CIO and Lead Portfolio Manager

Gary is the Chief Investment Of cer (CIO) for Concord Asset Management and is responsible for macroeconomic analysis, asset allocation, and security selection, in addition to trading and investment operations. He has over 21 years of investment experience and holds an undergraduate degree in economics from the University of Maryland and an MBA from The George Washington University School of Business.

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