



Fountainhead Asset Management Launches Dynamic Rebalancing Feature

Elevating optimized portfolios with the power of dynamic rebalancing.

WARREN, NJ, May 8, 2023 – Fountainhead Asset Management (“FAM”) is thrilled to announce the launch of a new dynamic rebalancing strategy for its partner advisors and their clients. This cutting-edge capability is customizable to meet each client’s specific investment objectives and risk tolerance.

Dynamic Rebalancing incorporates elements of relative value, momentum, and tax management in analyzing every position of each client account on a daily basis for rebalance consideration. In contrast to the widely implemented practice of rebalancing based on arbitrary time frames for all clients at once, this valuable approach analyzes each position on a daily basis and rebalances only those positions identified according to FAM’s set metrics. The result is a customized, optimal experience to each and every client.

“Our goal in releasing this new feature is to provide our partner advisors a disciplined and proactive approach to portfolio management, one that is not widely available in the industry,” said Joe Halpern, Chief Investment Officer at Fountainhead Asset Management. “Our rebalancing technology evaluates all portfolios on a daily basis to determine if specific parameters have been reached and if a rebalance is necessary. Our automated trading platform then recommends and seeks to execute the relevant trades, taking any tax consequences into consideration based on household level tax settings.”

Dynamic portfolio rebalancing allows FAM partner advisors to maintain their focus on the client’s best interest while delivering a differentiated client experience. FAM is confident this approach to these critical areas of investment management will elevate the curated services it offers to advisors, providing them with a unique offering that opens the door to gaining additional wallet share from existing clients.

About Fountainhead Asset Management

Fountainhead Asset Management (FAM) is an Outsourced Chief Investment Office (OCIO) solution providing complete leadership in the field of investing. FAM provides its partners - advisors, accountants, and others - with the experience, leadership, and capacity required to provide a sophisticated and differentiated investment management offering. By utilizing FAM’s OCIO services and capabilities, its partners are empowered to better serve advisor/client relationships while growing their businesses simultaneously.

To learn more about the power of partnering with Fountainhead Asset Management, please visit www.fountainheadam.com. Enhance Your Story With Us.

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