December 31, 2013

# Successful Portfolios LLC

Registered Investment Advisors

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4.99%

6.31% -2.85%

2.82% 36.08%

-0.07%

4.97%

-0.24%

2.12%

0.17%

2.80%

## **Aggressive Growth Description**

The Aggressive Growth strategy seeks to identify and purchase the common equity of companies in, or about to enter, an abnormal high growth stage of their business cycle. The fund focuses on equities that are displaying, or are expected to soon demonstrate, relative price strength and positive earnings momentum. The fund intends to hold a relatively concentrated portfolio of 30 or fewer stocks.

### **Portfolio Managers**

Bench Mark

Strategy Bench Mark 6.21%

4.36%

1.06%

1.12%

- > Thirty years of experience as a professional investment advisor
- H. Parker Evans, CFA, CMT

  Chartered Financial Analyst (CFA), Chartered Market Technician (CMT)
  - > MBA from Nova Southeastern University in 1987, B.A. Economics from Eckerd College in 1982
  - Co-founded Successful Portfolios LLC, February 2010
  - > Fifteen years of professional investment experience
  - Author of *The Low Beta Model* and *The Select Directional ETF Model* white papers
- Bradley E. Norbom, CFA 

  Chartered Financial Analyst (CFA)
  - Bachelor of Science in Finance from the University of South Florida in 1995

Return and Risk Measures				Growth of \$1,000 from Inception (Net of Fees)									
Inception Date 11/20/2012				Aggressive Growth Fund 65% VEXMX / 35% VFINX Bench Mark									
As of Date 12/31/2013				7155103	sive Glown	i i unu	0570	V LZXIVIZX /	3370 1111	VI Bellell I			
Total Net Assets \$74,386.50												\$	
No. of Assets Held 22											\$		
Returns	Strategy	y B	ench Mark									\$1	
Since Inception	50.55%		42.85%					·······				\$1	
YTD	50.65%		36.08%								$\rightarrow$	\$1	
Risk				,								\$1	
Monthy Annualized Volatility from Incpt.	12.14%		8.85%	Nov-12	F	eb-13	May	y-13	Aug-13		Nov-13	\$9	
					Facebook - FB				Whole Foods Market - WFM				
						_		THOIC I	Jous Mai	KCI - WI	1VI		
				Re	x Energy			Micron T			111		
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Largest 1	Holdings by	y Value		Sp		REXX K		Micron T	echnolog BAY		·IVI		
Largest 1	Holdings by	y Value		Spl Wi	unk - SPI	REXX K WHR		Micron T Ebay - El	echnolog BAY 1 - SCLA	y - MU			
Largest	Holdings by	y Value		Sp! Wl Ya	unk - SPI nirlpool - '	REXX LK WHR JDX	IN	Micron T Ebay - El US Silica	Cechnolog BAY 1 - SCLA 1 Financia	y - MU ıl - EVEI			
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	l Monthly I	Returns	(Net of Fed Iar Apr	Sp! Wh Ya Hu	unk - SPI hirlpool - ' ndex - YN	REXX LK WHR JDX	N Aug	Micron T Ebay - El US Silica Everbank	Cechnolog BAY 1 - SCLA 1 Financia	y - MU ıl - EVEI		Y	

2.64% -1.13%

### **Additional Information**

Performance is expressed in US Dollars. The benchmark for the Aggressive Growth Composite is 35% Vanguard 500 Index Investor Fund (VFINX), a proxy for the S&P 500 Index and 65% Vanguard Extended Market Index Fund (VEXMX), comprising of small and mid cap domestic companies. The blended benchmark rebalances monthly.

### Risks

The share prices for these companies will be more volatile than the overall stock market. More than likely, these companies will not pay dividends on their common shares and will have a small market capitalization. Remember that past results are not necessarily indicative of future performance.

### **Firm Definition**

Successful Portfolios LLC is an independent Registered Investment Advisor formed in February 2010. Successful Portfolios LLC has no affiliations with any other investment advisors. For further information regarding our firm, fee structure, and our qualifications, please visit www.successfulportfolios.com.