STERLING GLOBAL STRATEGIES

ABOUT STERLING GLOBAL STRATEGIES

Our Methodology

“Creating Wealth by Preserving Capital” is a description of our investment methodology and the stated goal of Sterling Global Strategies. What makes SGS unique is our process that includes cash as an asset class. All of our tactical strategies are managed using a proprietary algorithm which consists of a risk management overlay that can invest 100% of assets in cash during broad market declines. Sterling Global Strategies was created to provide investment options that may significantly reduce downside risk, with the ultimate goal of attempting to produce positive returns every calendar year.

Sterling Global Strategies offers unique strategies based on a proprietary algorithm that can be assessed through select financial advisors nationwide.

Our Strategies

Tactical Rotation Strategy seeks to provide absolute returns during any market cycle or condition by employing an equally-weighted strategic model that rotates between U.S. Bonds, commodities, REITs, cash, as well as international and domestic equities. The majority of asset managers resemble their benchmark, but we believe outperformance is best achieved by rotating into market leaders. The strategy attempts to identify the asset classes experiencing long-term bull markets and to try to avoid those asset classes in extended bear markets.

Emerging Markets Strategy was created to take advantage of the long-term growth prospects being enjoyed by Brazil, China, and India. We have added two developed countries (Germany and Australia) to lower the correlation of the portfolio components. The low correlation, coupled with our go-to-cash risk management process, is designed to capture the upside potential of these three high growth markets while lowering overall downside risk.

Tactical Bond Strategy was designed to outperform during a rising interest rate environment by rotating between emerging market bonds, international bonds, domestic high-yield and investment grade bonds, TIPS, and cash. The strategy employs a risk management tool that allows 100% cash exposure during declining bond markets.

Alternative Bond Strategy attempts to perform well during a rising interest rate environment and was created by adding an inverse 20+ year Treasury ETF to the Sterling Tactical Bond Strategy.

Global Allocation Strategy combines three of our investment methodologies into one all encompassed investment vehicle. The proportional allocation of investments is 50% to Sterling Tactical Rotation Strategy, 30% to Sterling Tactical Emerging Markets Strategy, and 20% to Sterling Tactical Bond Strategy.

Our Executive Team

Michael Haig is the Co-Founder and Chief Executive Officer of Sterling Global Strategies. His focus is on the development and marketing of SGS' tactical strategies across a multitude of investment platforms, including regional banks, RIA's and broker-dealer firms.

Prior to SGS, Michael benefited from an extensive employment history with UBS Financial Services and Smith Barney. As First Vice President of Investments, Michael was responsible for investment research, cash management, portfolio analysis, implementing trading models, and overseeing various corporate services.

Michael has a Bachelor's Degree in Business Administration from California State Polytechnic University of Pomona.

Greg Carroll is the Co-Founder and President of Sterling Global Strategies. He brings a tremendous amount of knowledge to the firm with nearly 20 years in the financial services industry and experiencing many extreme market cycles during his profession.

He started his career with Smith Barney and UBS, where he specialized in risk management, retirement planning, and providing customized investment solutions.

Greg received his Bachelor's Degree from Arizona State University. Greg is an active supporter of the local community and served as the past Chairmen of the Boys and Girls Club of San Marcos' Board of Directors.

Mark Eicker began his financial career at Smith Barney in 1993, and has since continued to dedicate his professional career to helping investors achieve their investment goals while also attempting to reduce their risk. As Chief Investment Officer, Mark has developed a set of proprietary algorithms that seek to significantly reduce portfolio volatility and downside market exposure, while also striving for positive returns in any market environment. In this role, he continues to develop new investment strategies that can take advantage of the inconsistencies of the capital markets.

Mark has been quoted in numerous national investment publications as well as respected trade magazines, and has recently been selected to be a contributor for Forbes. He can also be found speaking and presenting on the ETF industry, the global economy and other investment related topics at industry conferences and events across the country.

Mark holds a Bachelor's Degree from the University of New Mexico.