



Automated Allocations

*The Strategy That Adjusts...
Automatically.*

Video Script Overview The Automated Allocations App

Before we get into the Automated Allocations App, let's take a minute and map out where we're going. There are nine videos totaling fifty-eight minutes. That may sound like a lot at first, but when we break it down, it's actually pretty simple.

We start with standard Automated Allocations. This covers the initial buy, all future buys and sells, and the PAMMY. That's it. No additional funds are added to the initial investment. Just patience, discipline, and direction from Automated Allocations. Standard AA is covered in two videos totaling just thirteen minutes. In a way, this is really all you need to understand the basic AA strategy.

But then our first "what if?" comes up: What if I want to add new funds to my AA portfolio? That's where AA Plus! comes in. AA Plus! was originally designed to add a relatively small amount of new money when the portfolio had exhausted its available cash, or "dry powder." It also provides a structured way to add regular contributions or a larger one-time amount of new money to an existing AA portfolio. AA Plus! is covered in one nine-minute video.

Then comes another "what if?" What if I need to do a PAMMY and an AA Plus! at the same time? That's PAMMY Plus, and it's covered in one video that's only five minutes long. After that is a nine-minute bonus video you don't want to miss.

The final four videos are really just icing on the cake—twenty-two minutes of icing.

They're designed to answer the other "what ifs" that may come up:

What if I miss a trade?

What if there's a stock split?

What if I want to print a report?

What if I want to add new funds without using AA Plus!?

What if I want to withdraw funds?

What if I need to raise cash?

The Automated Allocations App includes tools to handle each of these situations.

So don't let nine videos and fifty-eight minutes seem overwhelming. We'll take it one piece at a time, and by the end, you'll have seen how the App handles both everyday AA investing and the less common situations that may come up along the way.

And remember—through all of these things: Automated Allocations adjusts... automatically.

Enjoy.