

# MEDIA KIT

## Address

777 Brickell Ave Suite #500-9455  
Miami, FL 33131

## Phone

(305) 824-2702

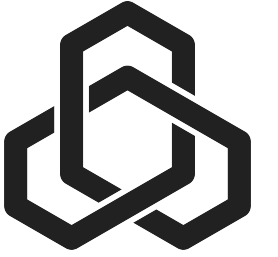
## E-mail & Web

[info@potomacfund.com](mailto:info@potomacfund.com)  
[potomacfund.com](http://potomacfund.com)

## Media Contact

Christopher Norton  
Chief Marketing Officer  
[cnorton@potomacfund.com](mailto:cnorton@potomacfund.com)  
(510) 850-4602

## HISTORY



In 1987, Potomac began creating a selection of tactical, unconstrained strategies for building and preserving wealth.

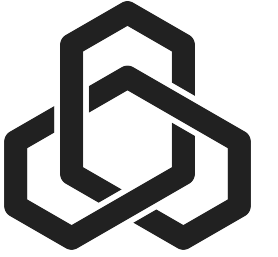
Today, you can match the right Potomac solution to each investor's needs.

Model  
Strategist

Affiliated  
Funds

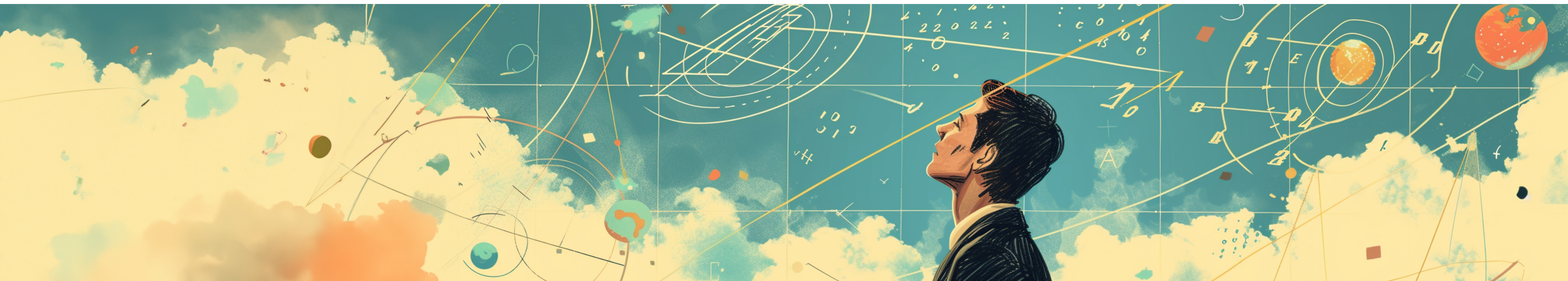
Union  
TAMP



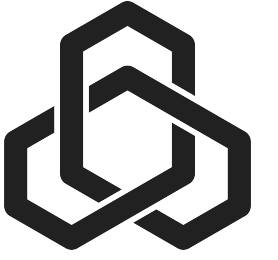


## Boilerplate.

Headquartered in Miami, Florida, Potomac Fund Management (“Potomac”) is an investment strategist firm for financial advisors. With strategies available on numerous platforms, including Envestnet, Orion Portfolio Solutions, SmartX, the Union TAMP platform, and more, Potomac supports advisors with the resources best suited for their individual businesses. Each avenue is built on Potomac’s core belief that financial success is about more than hitting a number twenty years into the future; it is about feeling confident as you get there.





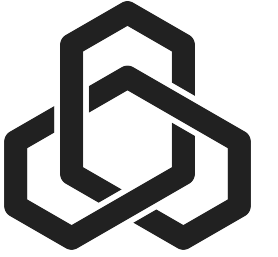


## Compliance considerations.

Utilization of the Potomac brand should only be done with authorized use/approval, all statements should be accurate and avoid any misleading content, and no mentions of specific products or performance can be made without prior review and approval by Potomac.







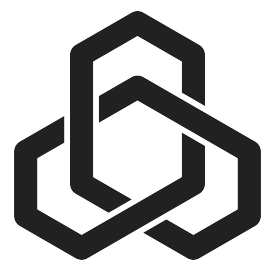
## Potomac trademark

The firm tagline, “Built to Conquer Risk™” has been accepted for trademark, and should always be used with the “TM” when used in headline and body copy.

INVESTMENT STRATEGIES AND  
SOLUTIONS FOR FINANCIAL  
ADVISORS.

BUILT TO CONQUER RISK™

BRAND USE



Potomac banner mark.

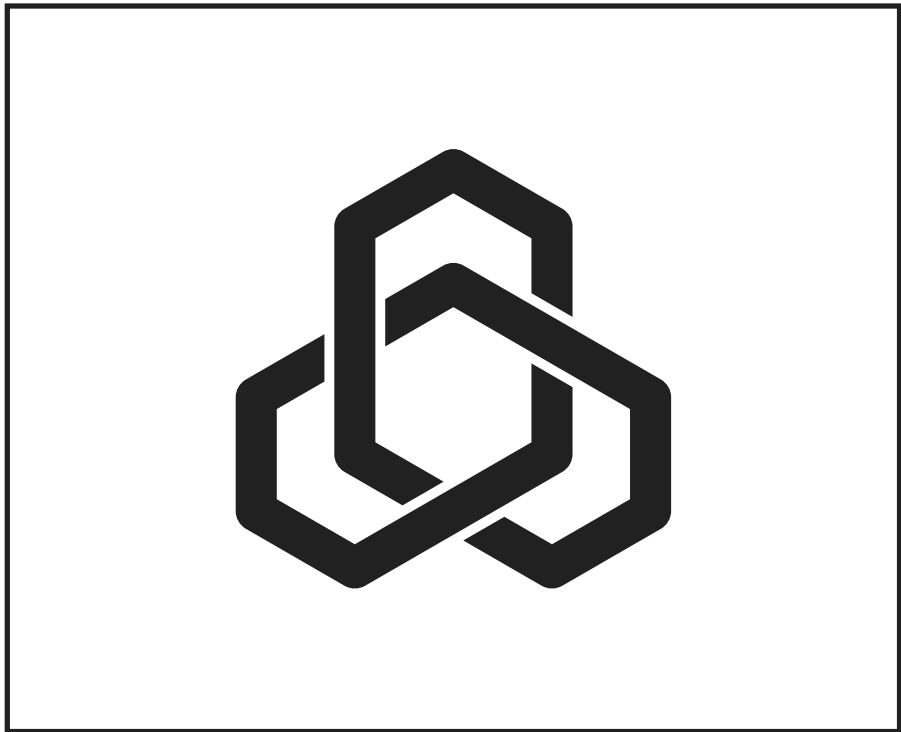
Whenever possible, the full banner mark is to be used to represent Potomac. For social media and other digital assets, the icon may stand alone as needed.



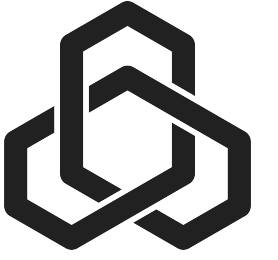


# Potomac icon.

The Potomac Icon is primarily reserved for situations where the banner mark is not suitable. It finds its application in specific client promotional materials, social media platforms, and web tabs that demand a square format and where our brand name is already established. The Icon is available in our corporate gray, corporate yellow, and white color variations, providing versatility in its usage.

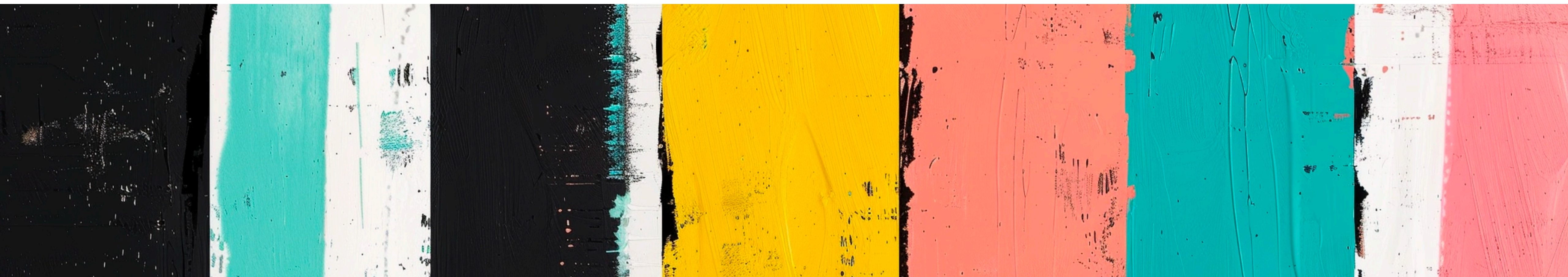






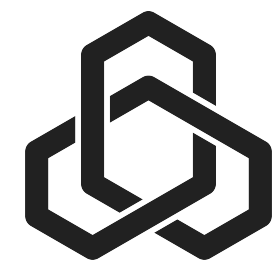
## Potomac colors.

The Potomac Yellow is the primary color that should be applied across all communications, to uphold brand consistency. On the web, and in design elements, the Potomac Dark Gray may be used as header text, and body text. The Potomac Turquoise and Potomac Pink are only to be used sparingly as secondary colors.





BRAND USE



Potomac  
Yellow

Pantone  
PMS 7405 U

CMYK  
0, 24, 94, 0

RGB  
254, 192, 15

HEX  
FEC00F

Potomac  
Dark Gray

Pantone  
PMS BLACK 6 U

CMYK  
72, 66, 65, 73

RGB  
33, 33, 33

HEX  
212121

Potomac  
White

Pantone  
PMS 7405 U

CMYK  
0, 0, 0, 0

RGB  
255, 255, 255

HEX  
FEC00F

Potomac  
Turquoise

Pantone  
PMS 325 U

CMYK  
100, 0, 6, 13

RGB  
0, 222, 209

HEX  
00DED1

Potomac  
Pink

Pantone  
PMS 186 UP

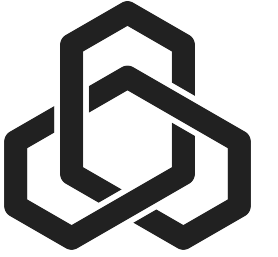
CMYK  
0, 80, 61, 8

RGB  
235, 47, 91

HEX  
EB2F5B



## POTOMAC'S LEADERSHIP TEAM



**MANISH KHATTA**

CEO & CIO



**JEFF GOODNOW**

Chief Growth Officer



**JENNIFER BURTON**

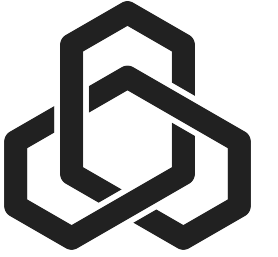
Chief Operations Officer



**CHRISTOPHER NORTON**

Chief Marketing Officer





## Dan Russo, CMT®

“We believe in probability, not predictions.”

Dan has been in the securities industry for 22 years. He holds an MBA degree in Finance from Fordham University in New York City and a B.S. degree in Finance from Long Island University, C.W. Post. He is also a Chartered Market Technician, having earned the right to use that designation in 2012.

He has experience with a wide range of institutional investors, working with them to perform fundamental, technical, and quantitative research to navigate the market and generate actionable trading and investment ideas.

At Potomac Fund Management, his primary roles include conducting technical and quantitative analysis, structuring portfolios of ETFs based on this analysis, and providing ongoing written research for the firm’s financial advisor client base.

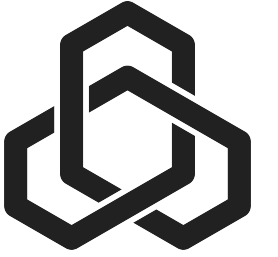


**DAN RUSSO, CMT®**

Portfolio Manager and  
Director of Research

 @DanRusso\_CMT

 [linkedin.com/in/danielrusso/](https://www.linkedin.com/in/danielrusso/)



# DAN RUSSO, CMT®

## Technical, Fundamental, and Quantitative Analysis

What analysis do you use for forecasting the market's outcome? Dan has experience with all these methods by studying past data and using probability to make decisions for the future. Learn from his perspective of what type of analysis is best for your strategy and learn the differences between all three.

## Investment Strategy

Every investment strategy should be different depending on the market circumstances. What plans do you have in place to help investors achieve financial and investment goals?

## Development

Launching a successful branch of your company doesn't happen overnight. How can you build a loyal base through daily and weekly market research reports? Learn how written market research can be beneficial to your business.

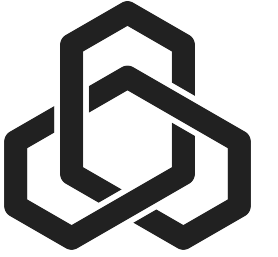
### QUICK FACTS

- Portfolio Manager of Potomac since 2020
- Visited the NYSE for the first time at the age of 12
- Ran the 2016 NYC Marathon
- Technical Analysis enthusiast
- Teaches a technical analysis class at Baruch College in New York City

### AS SEEN ON

Bloomberg TV, CNBC, TD Ameritrade Network, and more.





# Christopher Norton

“Laugh hard, run fast, be kind.”

Christopher is an innovative, award-winning, multidisciplinary creative with a passion for storytelling. He has worked with a wide array of large and independent clients in the news, entertainment, and financial services. While his skill set is vast, Christopher’s expertise is found in the inner workings of a brand story. He has spent his career leading different marketing teams in the financial sector overseeing campaigns, PR strategies, brand awareness, and more.

As Chief Marketing Officer at Potomac, Christopher seeks to deliver world-class, story-driven creative to connect Potomac to its audience.

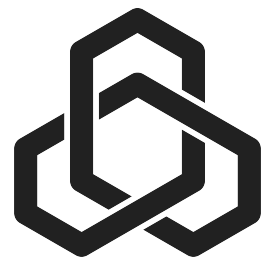


**CHRISTOPHER NORTON**

Chief Marketing Officer



[linkedin.com/in/copaflyer/](https://www.linkedin.com/in/copaflyer/)



# CHRISTOPHER NORTON

## Brainstorming

This is the most underrated element of any creative exercise. Effective brainstorming isn't lightning in a bottle; it's a skillset that can be developed like any other. How do you build a consistent, repeatable strategy to generate phenomenal ideas?

## Creative Development

A great idea is only half the battle. Moving from effective brainstorming to a well-executed campaign requires structure and precision. How do you move the needle with limited resources and even less time?

## Campaign Design

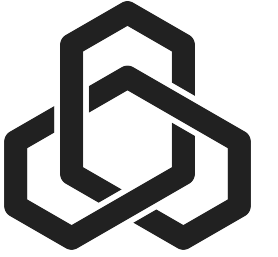
How effective brainstorming and precise creative development have led to campaigns that have punched far above their weight and some that have failed spectacularly. What can these inspire for your business?

## QUICK FACTS

- Over a decade of leading agency creative
- CMO of Potomac since 2019
- Drives a 1961 Mercury Comet
- Showrunner of the Conquer Risk Podcast
- Helped dozens of RIAs build their brand infrastructure



## DISCLOSURES



Potomac Fund Management ("Company") is an SEC-registered investment adviser. This information is prepared for general information only and should not be considered as individual investment advice nor as a solicitation to buy or offer to sell any securities. This material does not constitute any representation as to the suitability or appropriateness of any investment advisory program or security. Please visit our [disclosure page](#) for more information. The company does not make any representations or warranties as to the accuracy, timeliness, suitability, completeness, or relevance of any information prepared by any unaffiliated third party, whether linked to the Company website or incorporated herein, and takes no responsibility for any of this information. The views of the Company are subject to change and the Company is under no obligation to notify you of any changes. Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment or investment strategy will be profitable or equal to any historical performance level.

Performance results reflect the composite performance of all fully discretionary portfolios managed by Potomac according to the strategy subject to policies that may require the exclusion of certain accounts. All returns are time-weighted and reflect the reinvestment of dividends and capital gain distributions. Gross performance returns do not reflect the payment of investment advisory fees but reflect the underlying fund management fees, other fund (administrative) expenses, and redemption or 12b1 (fund marketing) fees, if any. Net performance reflects the deduction of a model fee (the highest investment advisory fee charged by Potomac), underlying fund management fees, other fund (administrative) expenses and, if any, redemption or 12b1 (fund marketing) fees. Net of fee returns are calculated using a model fee of 2.5%. The model fee, applied monthly, is the highest fee that may be or has been charged to an investor in this composite. Actual investment advisory fees incurred may vary. Past performance does not guarantee future results. There is no guarantee that any investment strategy or account will be profitable or will avoid loss. Individual investors' objectives, financial situations, their specific instructions, or restrictions on investments, or the time at which an account is opened, or additions are made may result in different trades and returns. Performance for the strategy presented may differ materially (more or less) from the performance of the comparable benchmark and other Potomac investment strategies. Market and economic conditions could change in the future producing materially different returns. Results do not reflect the impact of taxes for taxable accounts or their owners. You cannot invest directly in an index. This presentation is supplemental to the composite report. The Annual GIPS® Report is available upon request. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.



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