

Why We Put the “FORCE” in Capital-FORCE

Turning Saved Money into Intentional Investing

Most firm names sound interchangeable; Capital-FORCE was never meant to be one of them. Behind our name is a simple belief: your capital is not a line item, it is the stored life energy of families, business owners, and professionals who did the hard things when it would have been easier not to. In this story, I share why we capitalized FORCE, how it reflects a rules-based, research-informed discipline, and what “Investing Greatness” means in real life for both individual investors and financial advisors who want more than market exposure. If you have ever felt the tension between doing everything right as a saver and still feeling unsteady as an investor or advisor, this is the origin story we built for you.

We named our firm Capital-FORCE because we wanted the name itself to tell a story about what we believe capital can become when it is guided by discipline, courage, and preparation, not just by exposure to the market. We capitalize the word **FORCE** because we see it as more than a modifier; it is the core idea that turns ordinary investing into something purposeful, intentional, and aligned with what we call “Investing Greatness” for both individual investors and financial advisors.

Capital, transformed with purpose

For us, “capital” is not an abstract line on a balance sheet. It is the accumulated life energy of families, professionals, business owners, and clients who have sacrificed time and comfort to build something that lasts. When we talk with advisors, we hear the same thing again and again: their clients are not looking for thrills, they are looking for clarity, consistency, and a plan that respects what their money represents. Individual investors echo that sentiment, especially those who have lived through more than one bear market and want a framework, not a hunch.

The “Capital” in Capital-FORCE anchors us in this reality. Our ETFs, our research, and our communication are all built on the conviction that long-term results start with treating capital as something entrusted, not something to be gamed. That is why we lean into rules-based, research-informed strategies instead of charismatic stock picking or market guessing.

Why FORCE is in all caps

We write FORCE in all caps because it expresses the active side of what we do. Capital on its own can sit idle, drift with whatever the market offers, or chase whatever is popular in the moment. FORCE signals that we are intentionally applying a structured discipline to that capital, giving it direction and purpose.

That FORCE shows up in several ways:

- A force of rules, not opinions: We rely on systematic, rules-based approaches that translate decades of market research into consistent decisions, rather than relying on moods or headlines.
- A force of preparation: We design strategies that acknowledge volatility and cyclicity, so investors and advisors have a plan before the storm, not a reaction during it.



- A force of clarity: We strive to explain what we do in plain language, so both advisors and individual investors can see how the discipline works and where it fits in a portfolio.

The capitalization is a visual reminder that our role is to bring that kind of focused energy to the way capital is invested. It is not about aggression for its own sake. It is about a steady, deliberate push toward better behavior, better decisions, and better odds of achieving the outcomes that matter to real people.

In our name, FORCE also serves as a deliberate modifier for Capital, shaping how we want investors and advisors to read the relationship between the two words. Capital is the “what” – the savings, proceeds, inheritances, and retained earnings that real people and real businesses have worked hard to build. FORCE is the “how” – the disciplined, research-informed, emotionally aware way that capital is put to work in the markets. By pairing them, we are saying that capital by itself is not enough; what matters is the quality of the force applied to it. For individual investors, that means their hard-earned savings are not simply exposed to the market but guided by a defined process. For financial advisors, it signals that the strategies they select for clients are intended to carry the weight of a philosophy and a framework, not just a ticker symbol.

The link to “Investing Greatness”

“Investing Greatness” is our way of naming the standard we are aiming for, both in our strategies and in our culture. For individual investors, Investing Greatness is not about picking the one perfect stock or timing the top and bottom of every cycle. It is about having an approach that is evidence-based, repeatable, and emotionally livable through full markets, not just in the calm years.

For financial advisors, Investing Greatness means having tools that are built to work inside a real practice: clear enough to explain to clients, robust enough to withstand scrutiny, and transparent enough to support due diligence and portfolio construction. Advisors need strategies that can be defended in an investment committee meeting and understood in a client review; we design with both of those conversations in mind.

Capital-FORCE ties these threads together. Capital is the raw material. FORCE is the applied discipline. Investing Greatness is the destination: a long-term experience where investors and advisors can recognize their beliefs, their process, and their outcomes as aligned.

What FORCE means for individual investors

When an individual investor sees the name Capital-FORCE, we want them to feel that their effort is meeting our discipline. Many individual investors know the frustration of doing “everything right” in terms of saving, only to feel lost when it comes to choosing investments, reacting to volatility, or filtering the constant noise of financial news. FORCE represents the structure that can support them when their emotions are most likely to sabotage their plans.

In practice, that means:

- Turning complex research into usable ETFs: Instead of expecting every investor to become a full-time analyst, we build products that embed a research discipline into a tradable vehicle.
- Emphasizing transparency: We focus on index-based strategies and clear communication so investors can see what they own, why they own it, and how it is selected.



- Framing volatility differently: Like the bison in our logo that faces storms instead of fleeing them, we talk about volatility as something to be understood and prepared for, not something to be feared at all costs.

For an individual, Investing Greatness might look like staying invested through a difficult period because they understand the discipline behind the strategy. It might look like having a portfolio that reflects a growth mindset without becoming a speculative roller coaster. It certainly looks like being able to explain to a spouse, a partner, or a friend why their investments make sense.

What FORCE means for financial advisors

For advisors, FORCE speaks to the weight and reliability they look for in an investment partner. Advisors live in the tension between markets that move quickly and clients who need patience, reassurance, and perspective. They do not just need products; they need frameworks, language, and alignment with their own philosophy.

Capital-FORCE was built with that reality at the center. The FORCE in our name signals that we intend to be an active ally in the advisor's work, not a passive listing on a platform. That shows up in several ways:

- Strategy design: Our ETFs are grounded in disciplined, repeatable methodologies that can be documented, presented, and integrated into a broader asset allocation plan.
- Communication: We will invest heavily in explaining our approach in advisor-ready language, from detailed methodology explanations to client-approved narratives that support ongoing conversations.
- Cultural alignment: We talk openly about our internal principles, like radical transparency, bold humility, and long-term thinking, because advisors deserve to know how the people behind the products behave when markets are difficult.

When advisors hear "Investing Greatness," we want them to think beyond performance charts. We want them to think about a partnership where the investment process, the educational content, and the day-to-day interactions all reflect the same underlying conviction: that disciplined growth investing, communicated clearly, can be a powerful force for their clients' futures.

A name that matches our symbolism

The name Capital-FORCE does not stand alone in our brand. It is reinforced by our visual and narrative choices, especially our bison logo and our Western-rooted story. We chose the bison because it is strong, resilient, and known for facing into storms instead of running away. That behavior is a living metaphor for how we think about market stress: you prepare for it, you move through it, and you let the process carry you forward.

Our color palette, including the distinctive blue-green we use, aims to balance boldness with calm, signaling both conviction and steadiness. Our storytelling connects the American West, our California roots, and the idea of open horizons with the notion that great investing often means going where others are not yet comfortable to go but doing so with a plan.



All of these elements tie back to the same core: Capital, given direction by FORCE, in pursuit of Investing Greatness. The name is the verbal expression of that idea. The logo and the slogan are the visual and emotional expressions. Together, they form a brand that is meant to feel consistent whether you are an individual investor reading a blog post, an advisor evaluating an ETF lineup, or a due diligence analyst reviewing our materials.

A promise embedded in the name

Ultimately, we chose the name Capital-FORCE, we capitalized FORCE, and we embraced “Investing Greatness” because we wanted our identity to contain a promise. The promise is not that markets will cooperate or that every strategy will outperform in every period; no honest firm can make that claim. The promise is that we will bring discipline, transparency, and courage to the work of investing on behalf of both individuals and advisors, and that we will build our culture to support that standard over time.

For individual investors, that promise means knowing that the people behind the ETF ticker are thinking about the long arc of their financial lives, not just the next quarter. For financial advisors, it means having a partner whose name, process, and behavior all point in the same direction: turning capital into a force for clients’ goals, grounded in a vision of Investing Greatness that is bigger than any one market cycle.

Investors should consider the investment objectives, risks, charges and expenses carefully before investing. For a prospectus or summary prospectus with this and other information about the Fund, please call (800) 324-3998 or visit the Capital-FORCE website at <https://www.capforceetf.com>. Read the prospectus or summary prospectus carefully before investing.

Investing involves risk, including possible loss of principal. There is no guarantee that any investment strategy, including Capital-FORCE's evidence-based and dynamic approaches, will be successful or achieve its objectives.

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