



PRESS RELEASE

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Flexible Plan Gold Bullion Strategy Fund Marks Ten-Year Anniversary

Bloomfield Hills, MI, July 10, 2023 – [Flexible Plan Investments, Ltd.](#), a leading provider of dynamic, risk-managed investment solutions, announced that its [Gold Bullion Strategy Fund](#) (QGLDX) has marked ten years since inception. The fund is designed to track the daily return of gold bullion using the gold futures market.

Launched in 2013, the Gold Bullion Strategy Fund has a patent-pending structure. Seventy-five percent of the fund's assets are allocated to short-term bond and money market holdings that can offset all or part of the expense ratio. It closely tracks the price of gold as benchmarked by the S&P GSCI Gold Index.

The fund also offers several tax advantages over gold bullion and commodities. These include 1099 tax reporting and normal capital gains treatment, compared to physical gold bullion ETFs which are subject to the 28% "collectibles" tax rate. It is not treated as a commodity fund, where gains are taxed 60% long term and 40% short-term. A VIT version of the fund is also available.

"For a decade, investors have embraced the Gold Bullion Strategy Fund to hold gold in their portfolios, as well as for the significant tax advantages. While the price of gold does fluctuate, and has been flirting with new highs of late, over the long-term gold has been a safe haven and true diversifier for portfolios," said Jerry Wagner, Flexible Plan founder and president and senior portfolio manager of the fund.

With \$1.6 billion in assets under management (AUM), Flexible Plan Investments is a sub-advisor for 12 mutual funds and manages thousands of separately managed accounts. It is a subadvisor to Advisors Preferred, a boutique asset manager that manages and distributes mutual funds to financial advisors and financial professionals.

"The innovative strategy of the Gold Bullion Strategy Fund offers a prime example of the dynamic, risk-managed fund solutions that Flexible Plan provides to advisors and their clients. The firm has been an active manager assisting investors to navigate the market for the past 40 years," said Catherine Ayers-Rigsby, president of Advisors Preferred.

For more information about the Gold Bullion Strategy Fund, visit www.goldbullionstrategyfund.com, www.flexibleplan.com, or www.advisorspreferred.com.

About Flexible Plan Investments, Ltd.

Established in 1981, Flexible Plan Investments, Ltd., invests over \$1.6 billion in assets for clients in its separately managed account business (as of December 31, 2022). As a founding member of the National Association of Active Investment Managers (NAAIM), Flexible Plan Investments, a turnkey asset management program provider, is one of the trade association's largest and oldest active money managers. The company's mission is to provide investors with competitive returns, while reducing risk through the use of dynamic risk management, strategic diversification, and cutting-edge technology and support services. For more information, visit www.flexibleplan.com

About Advisors Preferred LLC

Advisors Preferred (www.advisorspreferred.com) is an infrastructure provider for investment advisory firms looking to create and distribute mutual funds. Acting as the adviser in a sub-advised structure, the firm helps advisers build their practices with actively managed mutual funds, as well as product consultation, market intelligence, product placement, sales reporting, compliance services, and advanced trading.

Ceros Financial Services, Inc., member FINRA/SIPC, serves as distributor to the funds and is a commonly held affiliate of Advisors Preferred. Advisors Preferred and Ceros are not affiliated with the funds' subadvisers.

Investing in mutual funds involves risk, including loss of principal. Risks specific to the fund include bond risk, derivatives risk, equity risk, inverse ETF risk, junk-bond risk, leverage risk, management risk, market risk, mutual-fund and ETF risk, short-position risk, small- and medium-capitalization risk, and turnover risk. You can lose money by investing in the fund. Please carefully review the prospectus for detailed information about these risks.

There is no guarantee any investment strategy will generate a profit or prevent a loss. There is no guarantee the funds will achieve their investment objectives.

An investor should carefully consider the investment objectives, risks, charges and expenses of the funds before investing. This and other information can be found in the funds' prospectus and summary prospectus, which can be obtained by calling 1-855-650-7453. The prospectus should be read carefully before investing.

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