



## PRESS RELEASE

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For Immediate Release

### FLEXIBLE PLAN QUANTIFIED FUNDS REACH \$1 BILLION AUM

#### Quantified Funds employ dynamic asset allocation to adjust in uncertain markets

**Bloomfield Hills, MI, Feb. 16, 2021** – [Flexible Plan Investments, Ltd.](#), a leading provider of dynamic, risk-managed investment solutions, announced that its Quantified Funds family has reached \$1 billion in assets under management. Launched in 2013, the Quantified Funds are a series of actively managed funds that employ dynamic asset-allocation strategies to adjust to market environments.

“The growth and success of the Quantified Funds demonstrate the degree to which advisers are seeking strategically diversified portfolios of actively managed funds to help clients dynamically manage risk and returns in uncertain markets. The adoption of our funds by advisers looking for singular solutions, as well as their use in a more comprehensive solution like our Quantified Fee Credit separately managed account (SMA) strategies, is certainly heartening,” said Jerry Wagner, president and founder of Flexible Plan, and one of the funds’ portfolio managers. “With the popularity of our Multi-Strategy Core and Explore and All-Terrain SMAs, we are in the process of developing more funds to meet the expanding demand.”

While each of the 10 funds in the Quantified Fund family has a niche in Flexible Plan’s SMA strategies, several Quantified Funds have demonstrated exceptional performance:

- The Quantified STF Fund (QSTFX) was named by Morningstar as the top-performing tactical-allocation fund in 2020, after having been 2017’s best-performing domestic equity fund (with AUM topping \$100 million). It employs a trend-following strategy that seeks to outperform the NASDAQ 100 Index with less downside risk. The Quantified STF Fund returned 77.44%\* in 2020. To review SEC standardized performance, please click here: [www.quantifiedfunds.com/stf-fund](http://www.quantifiedfunds.com/stf-fund)
- The Quantified Market Leaders Fund (QMLFX) is a tactical asset-allocation strategy designed to overweight portfolio investments into the top-performing asset classes while eliminating exposure to underperforming assets. The fund was up 37.94%\* in 2020. To review SEC standardized performance, please click here: [www.quantifiedfunds.com/marketleaders](http://www.quantifiedfunds.com/marketleaders)

- Since 2013, the Gold Bullion Strategy Fund (QGLDX) has been the only U.S. mutual fund designed to track the daily return of the price of gold bullion. To meet its goal, the fund utilizes gold bullion ETFs and gold futures. The fund had a return of 19.28%\* in 2020. To review SEC standardized performance, please click here: [www.goldbullionstrategyfund.com/images/factsheet/QGLDX\\_Q4\\_2020\\_Fact\\_Sheet.pdf](http://www.goldbullionstrategyfund.com/images/factsheet/QGLDX_Q4_2020_Fact_Sheet.pdf)
- The Quantified Common Ground Fund (QCGDX) was developed to invest in common stocks of companies that can be considered compliant with both ESG (Environmental, Social and Governance) and BRI (Biblically Responsible Investing) standards. In 2020, the fund was up 14.67%\*. To review SEC standardized performance, please click here: [www.quantifiedfunds.com/common-ground-fund](http://www.quantifiedfunds.com/common-ground-fund)

\*Past performance is not indicative of future results.

Flexible Plan is a subadviser to [Advisors Preferred](http://www.advisorspreferred.com), a boutique asset manager that manages and distributes mutual funds to financial advisers and financial professionals.

“Our funds have seen very robust inflows in 2020 and into 2021 as investors have embraced active management to help mitigate market risk. The Quantified Funds are designed to assist investors in reaching their portfolio objectives, particularly during periods of extreme market volatility and dislocation, by seeking to optimize upside and minimize downside,” said Catherine Ayers-Rigsby, president of Advisors Preferred.

For more information about the Quantified Funds, visit [www.quantifiedfunds.com](http://www.quantifiedfunds.com), [www.flexibleplan.com](http://www.flexibleplan.com), or [www.advisorspreferred.com](http://www.advisorspreferred.com).

#### **About Flexible Plan Investments, Ltd.**

Established in 1981, Flexible Plan Investments, Ltd., invests over \$1.5 billion in assets for clients in its separately managed account business (as of Dec. 31, 2020). As a founding member of the National Association of Active Investment Managers (NAAIM), Flexible Plan, a turnkey asset management program (TAMP) 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](http://www.flexibleplan.com).

#### **About Advisors Preferred LLC**

Advisors Preferred ([www.advisorspreferred.com](http://www.advisorspreferred.com)) is a manager of mutual funds distributed to financial advisers and financial professionals. The firm helps advisers build their practices with actively managed mutual funds, as well as product consultation, market intelligence, product placement, sales reporting, 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 Quantified and Gold Bullion Strategy Funds are detailed here: [www.quantifiedfunds.com/fund-documents](http://www.quantifiedfunds.com/fund-documents) and [www.goldbullionstrategyfund.com/index.php/investor-materials](http://www.goldbullionstrategyfund.com/index.php/investor-materials). The Funds' prospectuses have additional details regarding the risks and should be read carefully.

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 prior to investing.**

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