Giving you and your clients the power of choice

Access and combine our risk-managed strategies within a single account on these popular platforms:

2 ways to access Flexible Plan managed accounts

Retail accounts

- ☑ **Schwab**
- ☑ **Trust Company of America**
- ☑ **TD Ameritrade**
- ☑ **Folio Institutional**

- Available for most qualified plan types as well as individual, joint, and trust accounts.
- Ability to build strategically diversified, risk-managed portfolios for one low account minimum.
- Monitoring and reporting through our proprietary OnTarget Investing process.
- Daily liquidity and reporting on client accounts.

Workplace retirement plans

(Self-directed brokerage accounts)

- ☑ **Schwab**
- ☑ **TD Ameritrade**
- ☑ **Fidelity**

- Retirement brokerage accounts available through select 401(k), 403(b), 401(a), and 457 plans.
- Expanded investment choices (100+ risk-managed ETF and mutual fund strategies) and access to professional management.
- Ability to construct and adjust retirement portfolios for specific goals and risk tolerances.

Why Flexible Plan?

- We offer 100+ suitability-based, rotational ETF and mutual fund strategies.
- All strategies are dynamically risk-managed using quantitative rule sets.
- We offer tactically managed strategies, including several that are traded daily.
- Many strategies have the ability to use leverage, go inverse the asset classes, or move to 100% cash.

Fees & minimums

- Manage accounts as low as $5,000.
- Flexible Plan Investments' annual advisory fees are 0.35% – 1.0%. Financial advisors may charge an additional annual advisory fee of up to 1.25%.
- Fee credits available through the Flexible Plan subadvised Quantified Funds.
- No-load, no-commission mutual funds and ETFs available through the program.

Flexible Plan Investments, Ltd.
Your partner in active wealth management

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