OnTarget INVESTING by Flexible Plan Investments, Ltd.

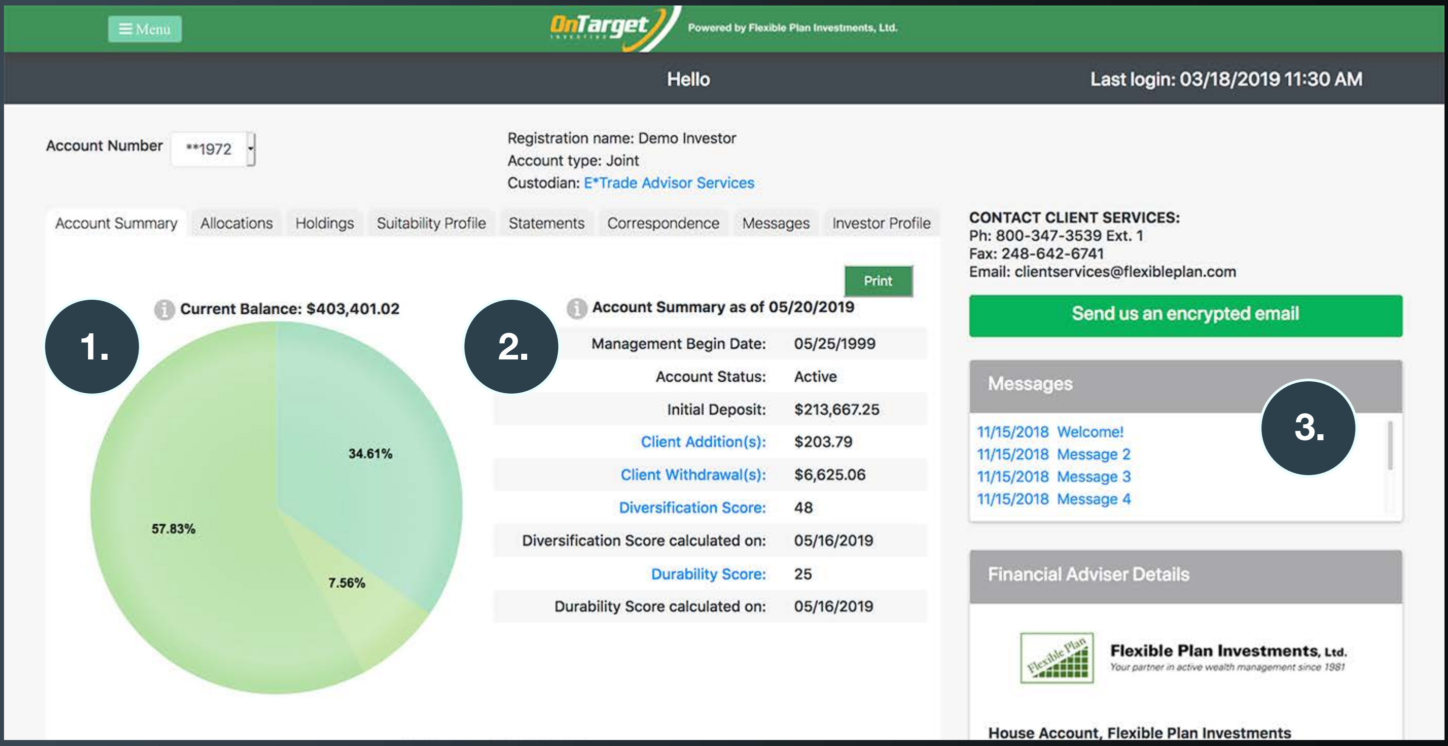
Track your investments against your custom benchmark

We're proud to launch the newly redesigned OnTarget Investing website with a more streamlined, modern look and expanded account detail.

- OnTarget Monitor updated <u>monthly</u> on a per account basis
- See current account balances and past statements
- Increased security with two-factor authentication during log in

NEW FEATURES AND ONTARGET REFERENCE SHEET

Account Summary



1. Account allocations

Shows the percentage breakdown of strategies in your portfolio. Hover over pie section with your cursor to see strategy name. Click the pie section and the Selector will open to see last week's strategy holdings, allocations, and performance.

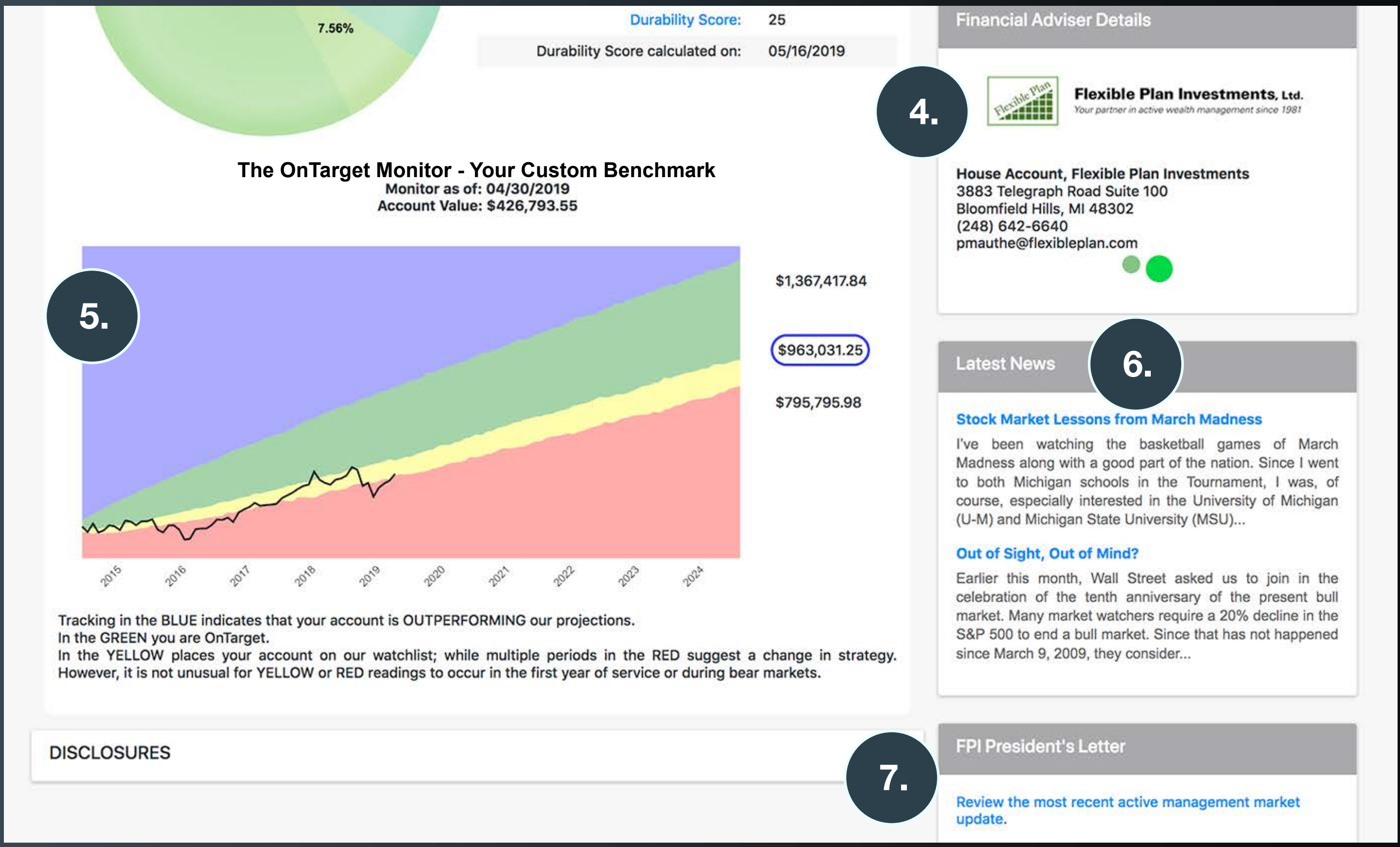
2. Account summary

Displays the account information in a quick-view table, including the account's diversification score (how correlated the strategies are to each other) and durability score (how robust the portfolio is likely to be in future market and economic environments). On the website, click on the blue shaded items to learn how to interpret these.

3. Message center

Lists messages for the account. Click link for the message.

Account Summary continued...



4. Financial adviser details

Shows the contact information of the financial adviser on the account. If there are multiple financial advisers on the account, click the dots to toggle between the information cards.

5. OnTarget Monitor

Updated monthly, the OnTarget Monitor displays the portfolio value (the black line) plotted against a hypothetical, color-coded projection of possible investment outcomes over the investor's stated investment time horizon (based on hundreds of Monte Carlo simulations). Based on these simulations, the top value listed on the right is reached or exceeded in 20% of the outcomes, the second value (the OnTarget goal) is reached or exceeded in 60% of the outcomes, and the bottom value is reached or exceeded in 80% of the outcomes.

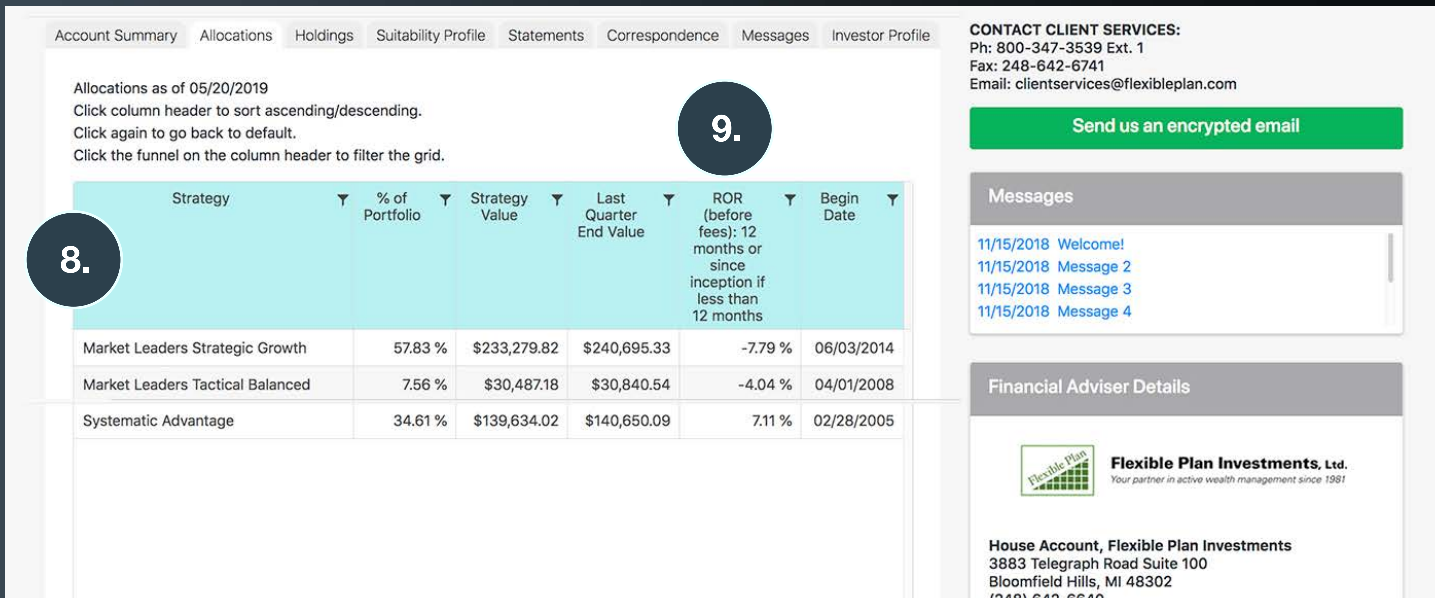
6. Latest news

Provides the latest market and investing news from Flexible Plan Investments, including "In My Opinion," a weekly article written by president and founder Jerry Wagner, and our latest "Market Update."

7. President's Letter

Links to the quarterly President's Letter, featuring investing insights from Flexible Plan Investments president and founder Jerry Wagner.

Allocations



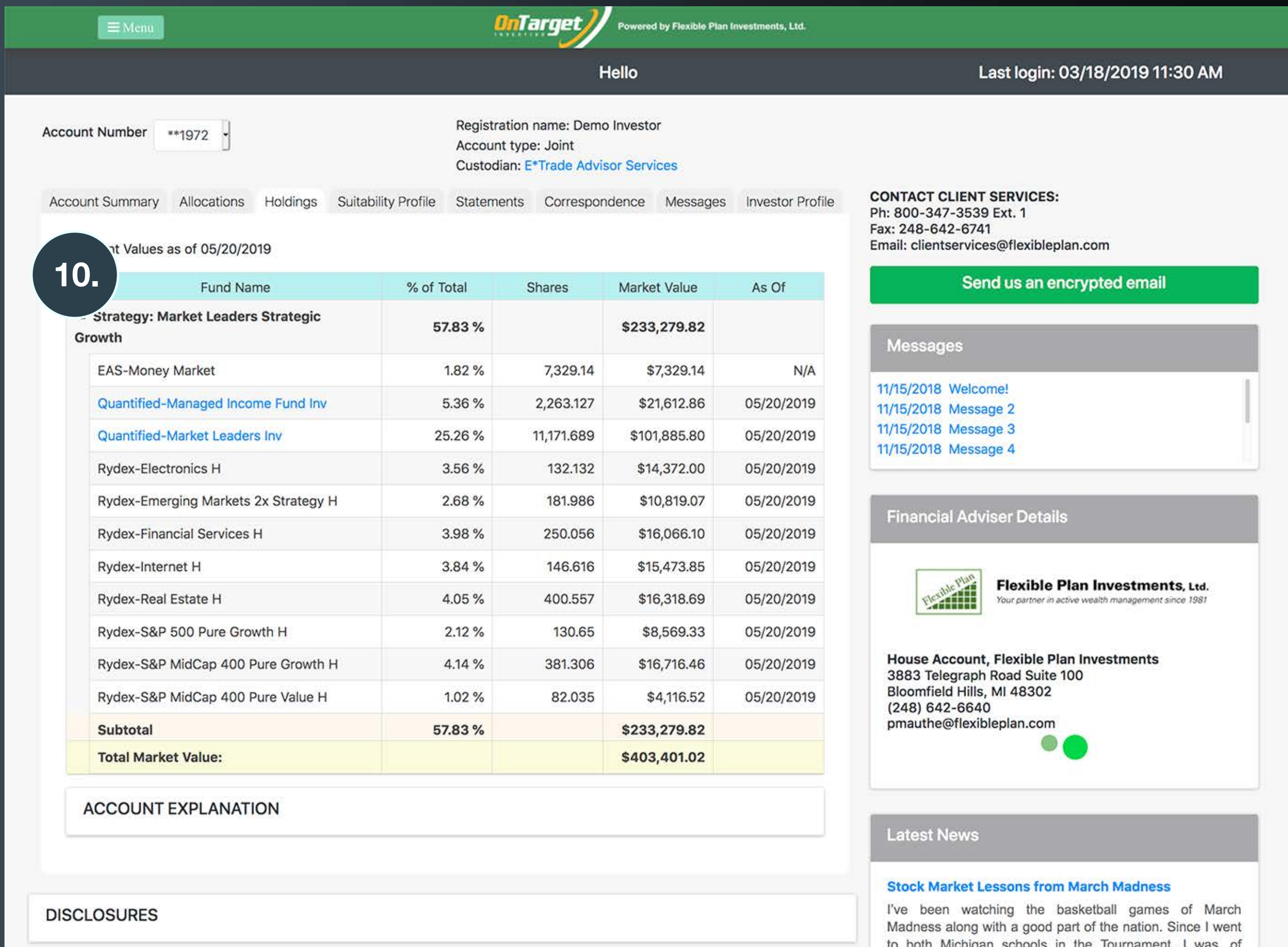
8. Allocations

Sortable list of strategies in the portfolio and allocations by percentage and value. The table can be sorted and filtered by fields.

9. Rate of return (ROR)

Rate of return for 12 months (before fees) on each of the strategies in the portfolio.

Holdings

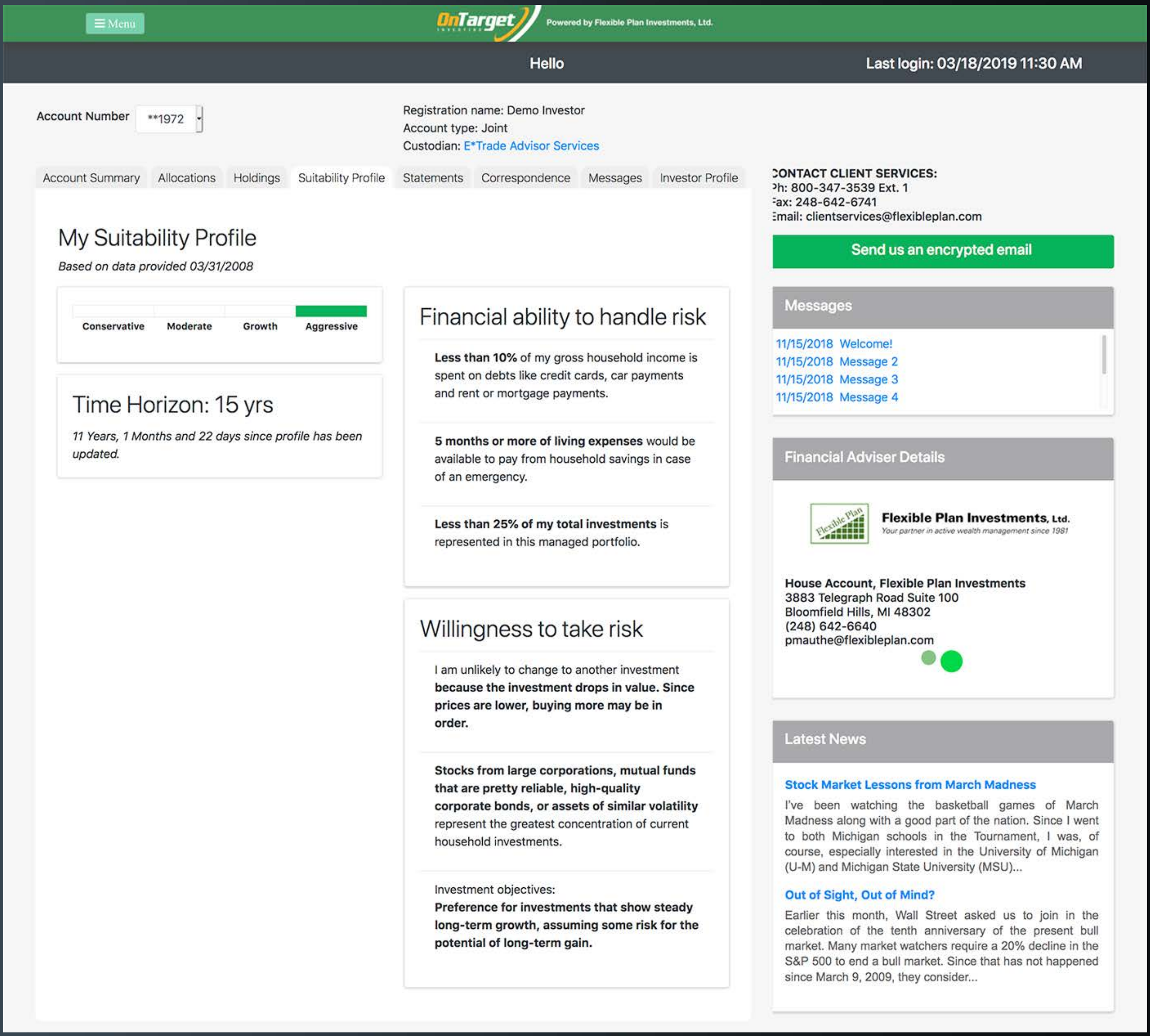


Fund Name	% of Total	Shares	Market Value	As Of
Strategy: Market Leaders Strategic Growth	**57.83 %**		**$233,279.82**	
EAS-Money Market	1.82 %	7,329.14	$7,329.14	N/A
Quantified-Managed Income Fund Inv	5.36 %	2,263.127	$21,612.86	05/20/2019
Quantified-Market Leaders Inv	25.26 %	11,171.689	$101,885.80	05/20/2019
Rydex-Electronics H	3.56 %	132.132	$14,372.00	05/20/2019
Rydex-Emerging Markets 2x Strategy H	2.68 %	181.986	$10,819.07	05/20/2019
Rydex-Financial Services H	3.98 %	250.056	$16,066.10	05/20/2019
Rydex-Internet H	3.84 %	146.616	$15,473.85	05/20/2019
Rydex-Real Estate H	4.05 %	400.557	$16,318.69	05/20/2019
Rydex-S&P 500 Pure Growth H	2.12 %	130.65	$8,569.33	05/20/2019
Rydex-S&P MidCap 400 Pure Growth H	4.14 %	381.306	$16,716.46	05/20/2019
Rydex-S&P MidCap 400 Pure Value H	1.02 %	82.035	$4,116.52	05/20/2019
Subtotal	**57.83 %**		**$233,279.82**	
Total Market Value:			**$403,401.02**	

10. Holdings

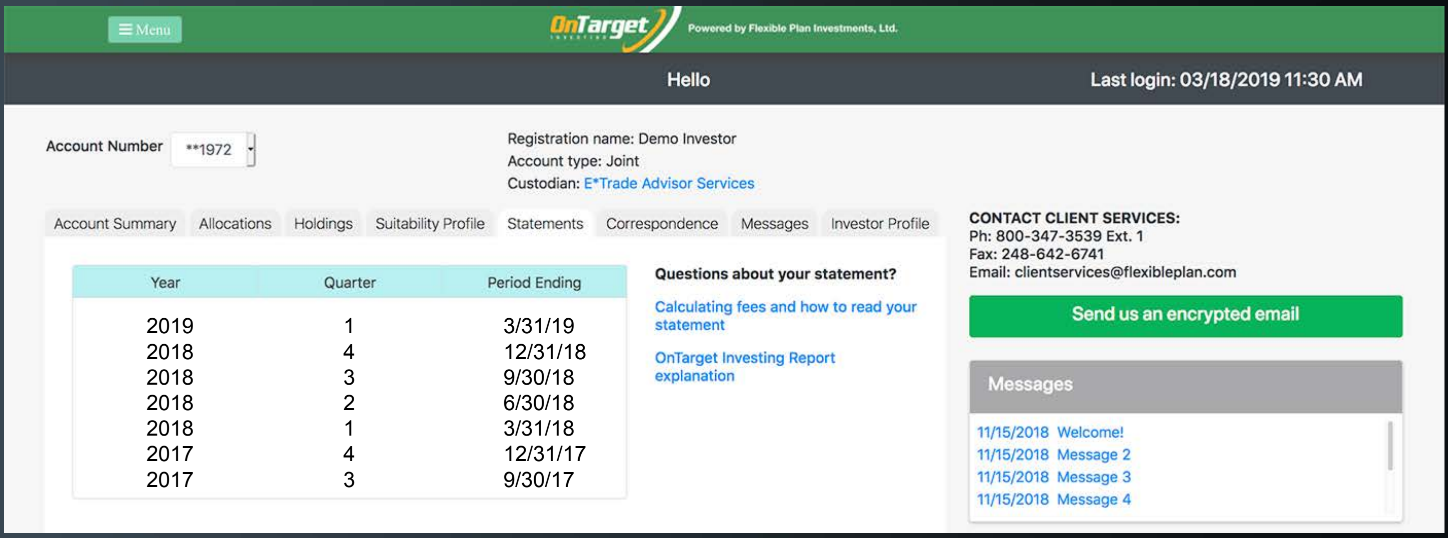
Holdings of each strategy within the account by percentage and shares owned. Provides the market value of each holding. To view the underlying holdings of a strategy, click the arrow to the left of the strategy name.

Suitability profile

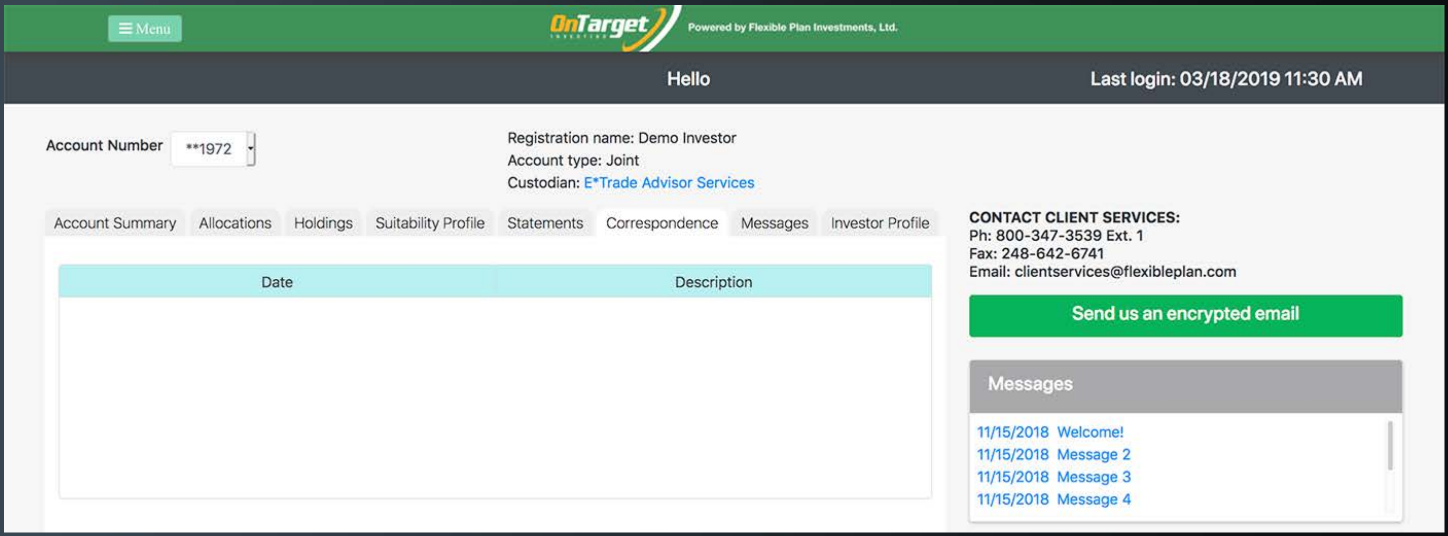


Shows the date and responses to the investor's most recent suitability questionnaire. A new suitability questionnaire should be completed if (1) the investor's financial situation has changed; (2) the investor's investment objectives have changed; (3) the investor wishes to impose any reasonable restrictions on the management of the account; or (4) the investor wishes to modify an existing restriction in a reasonable manner.

Statements and Correspondence

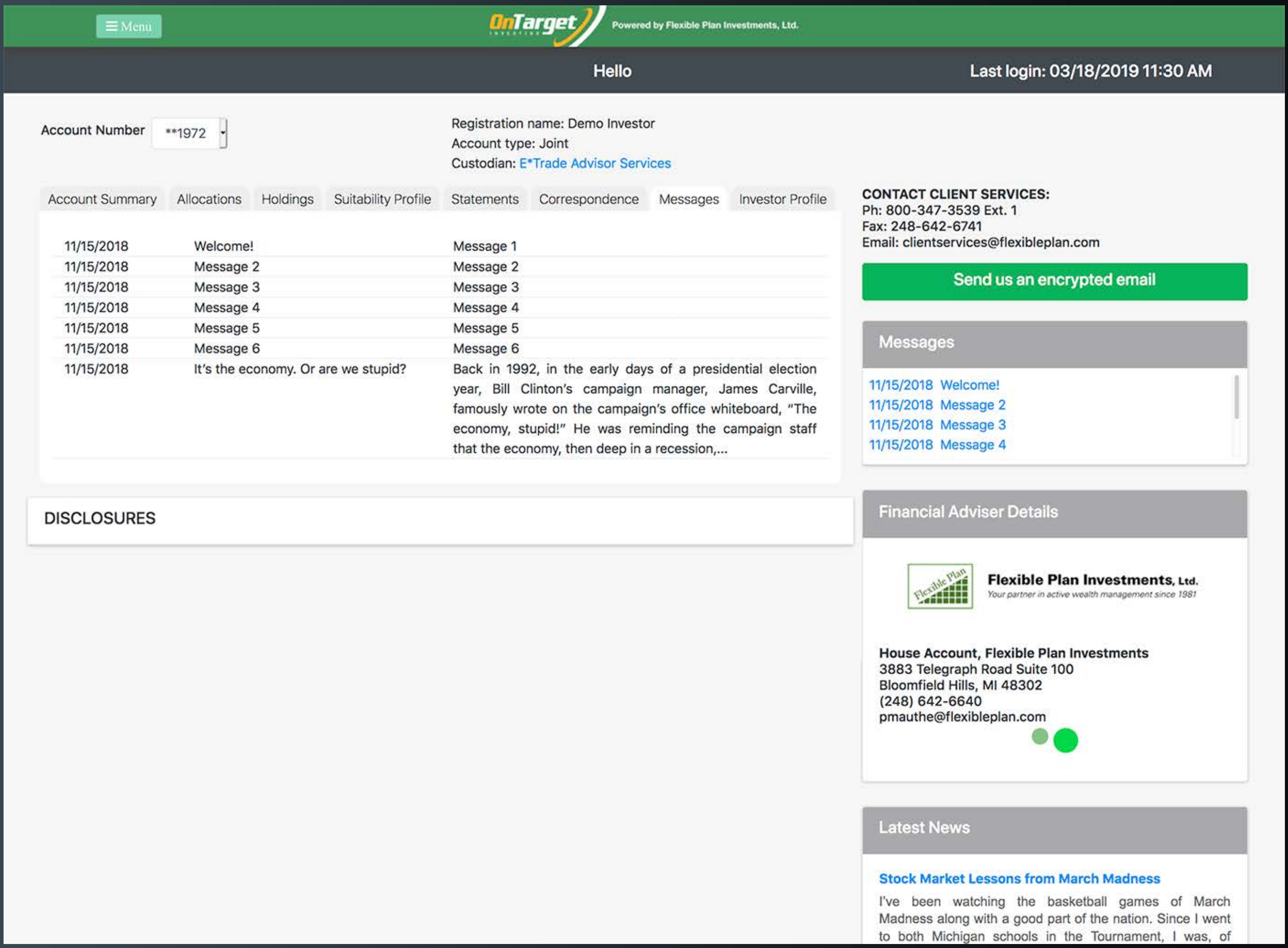


A statement archive is available for reference. Click link to download the statement.



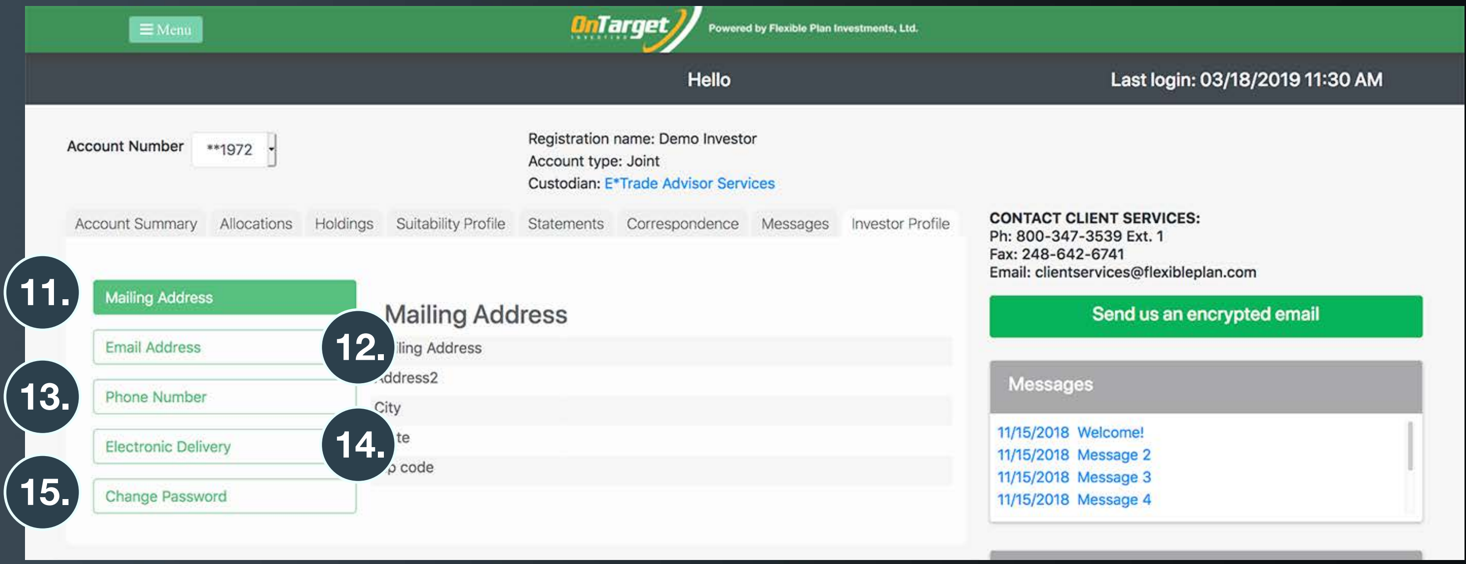
Under the Correspondence section, investors will find a copy of their welcome letter.

Messages



Account messages archive is available for reference.

Investor profile



11. Mailing address
Mailing address on file which users can update or add an address to the account.

12. Email address
Shows the email address(es) on file and allows users to update or add an email address to the account.

13. Phone number
Phone number(s) on file. Users can update or add a phone number to the account.

14. Electronic delivery
Elect electronic delivery of statements with an email address on record.

15. Change password
Easily change the password for the account to log in to ontargetinvesting.com.

Log in to see what's new, or create a username and password if you aren't already registered. All users must register the first time they visit the new website.

For questions about www.ontargetinvesting.com, contact clientservices@flexibleplan.com or 800-347-3539, ext. 1.