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 monthly 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.
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

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.
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.