

Solutions for every portfolio

STRATEGY CATEGORIES

QFC STRATEGIES—Our most popular E*TRADE strategies for 0.35% or less*

		Methodology	E*TRADE Advisor Services Strategic Solutions	Schwab* Maximum fee charged 0.50%	TD Ameritrade* Maximum fee charged 0.50%	Folio	Schwab	Fidelity (tax-exempt)	Jefferson National	Nationwide	Security Benefit Life	Most other VA/VUL products	3 year correlation to S&P 500 Index
Classic	Domestic Tactical Equity	MS	•	•	•								0.94
Diversified Tactical Equity	Domestic Tactical Equity	MS	•	•	•								0.89
Dynamic Fund Profiles (5 profiles)	Core	RAA	•	•	•								0.79
Fusion 2.0 (5 profiles) / Fusion Prime 2.0 (18 profiles)	Core	MS	•										0.32–0.53
Lifetime Evolution (5 profiles)	Core	E	•	•	•								0.86
Liquid Alternatives	Alternatives	MS	•	•	•								-0.04
Managed Income	Fixed Income	E	•	•	•								0.20
Market Leaders (5 profiles)	Core	TVA/TF	•	•	•								0.82
Multi-Strategy Core	Core	MS/TF/RAA	•										
Multi-Strategy Explore: Equity Trends	Domestic Tactical Equity	MS	•										0.77
Multi-Strategy Explore: Low Correlation	Domestic Tactical Equity	MS	•										0.77
Multi-Strategy Explore: Low Volatility	Domestic Tactical Equity	MS	•										0.77
Multi-Strategy Explore: Special Equity	Domestic Tactical Equity	MS/C/S	•										0.77
S&P Pattern Recognition	Domestic Tactical Equity	C	•										0.52
Political Seasonality Index	Domestic Tactical Equity	S	•	•	•								.073
Select Alternatives	Alternatives	E	•	•	•								0.85
Self-adjusting Trend Following	Domestic Tactical Equity	TF	•	•	•								0.72
Systematic Advantage	Domestic Tactical Equity	MS	•	•	•								0.95
TVA Gold	Alternatives	TVA	•	•	•								0.16

CORE—suitability-based strategies for different strategic goals

Evolution Plus (5 profiles)	E	•											0.67
Fusion (5 profiles) / Fusion Prime (18 profiles)	MS	•	•						•	•			0.32–0.53
Lifetime Evolution (5 profiles)								•	•	•	•		
Market Leaders (5 profiles)	TVA/TF	•	•	•	•			•	•	•	•	•	0.82
WP Strategies (3 profiles)	MS	•											0.17

ALL-TERRAIN—designed to deliver an absolute return strategy for all market environments

All Weather Dynamic—Leveraged (Growth)	TVA/TF	•	•	•	•				•				0.65
All Weather Dynamic—Unleveraged (Conservative)	EC/TF	•	•		•	•			•				0.44
All Weather Static (Moderate)	EC	•	•		•	•			•				0.18
Trivantage—Leveraged (Aggressive)	TF	•	•	•	•				•				0.63
Trivantage—Unleveraged (Balanced)	TF	•	•	•	•	•			•				0.42

DOMESTIC TACTICAL EQUITY—dynamic risk-managed equity strategies

Brighter Beta	E/MS	•			•								0.44
Classic	MS	•	•	•					•	•	•	•	0.94
Low Volatility/Rising Dividends	TF	•			•	•							0.88
Self-adjusting Trend Following	TVA/TF	•	•	•	•				•	•	•		0.72
Systematic Advantage	E/MS	•	•	•					•	•	•		0.95
Volatility Adjusted NASDAQ	TVA/TF	•	•						•	•	•		0.68

KEY

C Contrarian
E Evolution

EC Econometric
MS Multi-strategies

RAA Resampled Asset Allocation
S Seasonal

TF Trend Following
TVA Targeted Volatility Analysis

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		MUTUAL FUND PLATFORMS			ETF PLATFORMS		403(b) and VA/VUL PLATFORMS					3 year correlation to S&P 500 Index
		E*TRADE Advisor Services Strategic Solutions	Schwab* Maximum fee charged 0.50%	TD Ameritrade* Maximum fee charged 0.50%	Folio	Schwab	Fidelity (tax-exempt)	Jefferson National	Nationwide	Security Benefit Life	Most other VA/VUL products	
FIXED INCOME—substitute for bond portfolio												
Global Maturities	E	•			•			•	•			0.05
Managed Income	E							•	•	•		-0.04
Municipal Rotation	E	•			•	•		•	•			-0.27
Strategic High-Yield Bond	TF	•	•	•				•	•			0.32
Strategic High-Yield Growth	EC/TF	•	•	•				•				0.32
TACTICAL FIXED INCOME—aggressive trading vehicle using leveraged and inverse bond funds												
Fixed Income Tactical	MS	•	•	•	•			•				0.06
Government Income Tactical	MS	•	•	•				•				-0.14
WP Income Builder	MS	•										0.06
ALTERNATIVES—alternative strategies and asset classes												
Contrarian S&P Trading	C	•										0.40
Hedged Gold Bullion	TF	•	•		•							-0.33
Select Alternatives	E	•			•	•		•	•	•		0.53
TVA Gold	TVA	•				•		•				0.06
SECTORS—aggressive strategies designed for dynamic allocation to equity sectors												
Market Leaders Sector Growth	TF	•	•	•				•				0.75
Market Leaders Sector Growth Ultra	TF	•	•	•								0.78
INTERNATIONAL—equity and bond solutions for global investing												
Evolution Emerging Markets	E	•			•	•						0.53
Global Maturities	E	•			•	•		•	•			0.05
Global Select	E	•			•	•		•	•	•		0.58
Tactical Emerging Markets	TF	•										0.53
PRINCIPLED INVESTING—specialty risk-managed strategies supportive of client world view												
Classic Better World	MS	•			•							0.88
Classic Faith Focused	MS	•										0.83
Faith Focused Investing (5 profiles)	E	•										0.86
For A Better World (3 profiles)	E	•			•							0.88
KEY		C Contrarian	EC Econometric	RAA Resampled Asset Allocation			TF Trend Following					
		E Evolution	MS Multi-strategies	S Seasonal			TVA Targeted Volatility Analysis					

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QFC STRATEGIES

Use of the Quantified Funds and The Gold Bullion Strategy Fund, as to which Advisors Preferred, LLC serves as investment adviser and Flexible Plan Investments serves as a sub-adviser, generates a client credit between approximately 0.55% and 0.95% per annum (dependent upon custodian platform) from 100% investment in the QFC Strategies.

* SOME STRATEGIES MAY NOT BE AVAILABLE, ACTUAL COST DEPENDENT ON PLATFORM AFTER AFFILIATED FUND CREDIT.



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Your partner in active wealth management since 1981

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