

## ***New Quantified Eckhardt Managed Futures Strategy Fund Now Available at Schwab***

***Using a multi-strategy approach this new fund provides investors access to renowned quant trader Bill Eckhardt's institutional strategy without K-1s or performance fees.***

ROCKVILLE, Md., Nov. 11, 2024 – The Quantified Eckhardt Managed Futures Strategy Fund (QETCX) has launched on the Schwab platform. At its core is Bill Eckhardt's systematic trading approach, a strategy that has only been available since 1991 to hedge fund investors but is now open to retail investors for the first time. The fund combines this managed futures methodology with fixed income investments. Additionally, investors can access this institutional-quality strategy while receiving simple 1099 tax reporting instead of K-1s, and without paying performance fees.

QETCX's multi-strategy approach offers advisors and investors simplified access to institutional-caliber managed futures through a daily-liquid vehicle that provides 1099 tax reporting. Through this multi-strategy approach, the managed futures portion focuses on long and short positions across commodities, financials, and currencies, while the fixed income segment includes investments in U.S. government securities, corporate debt, and high-yield bonds. The fund applies Eckhardt Trading Company's methodology across more than 70 global futures markets, managed around the clock through a systematic, trend-following approach pioneered by Mr. Eckhardt, co-creator of the famous Turtle Trading experiment. The fund brings together Eckhardt Trading Company's systematic trading expertise with Flexible Plan Investments Ltd.'s (FPI) dynamic risk management capabilities.

"Our focus has always been on achieving long-term success through a disciplined approach to managed futures," said Mr. Eckhardt. "We believe this fund is a great opportunity for investors to potentially benefit from our disciplined approach to capturing market trends while managing risks. We look forward to seeing how this Fund can help empower investors to navigate today's challenging market environment."

The Quantified Eckhardt Managed Futures Strategy Fund is designed to help investors enhance their portfolio diversification and seek returns in various market conditions. As a non-diversified fund, it aims to deliver returns by employing tactical asset allocation and non-correlated strategies that capture upward and downward market movements. The fund's innovative structure allows it to adjust to market trends and may be a valuable addition to investment portfolios.

"This combination of managed futures and fixed income investments aims to provide opportunities during both market upswings and downturns," said Jerry C. Wagner, president of Flexible Plan Investments Ltd. "By extending the Fund's reach to the Schwab platform, we are excited to support the growing demand for our solutions."

*\* The Fund's current expense ratios are 2.25% for Advisor Class and 1.65% for Investor Class. Please review the Fund prospectus for detailed information regarding fees and expenses you pay if you buy, hold or sell shares of the Fund.*

## **About Advisors Preferred LLC**

Advisors Preferred LLC, based in Rockville, Maryland, serves as the investment adviser to mutual funds. The company offers strategic and disciplined investment management to institutional and retail investors alike, managing over \$1.6 billion in assets (as of March 31, 2024).

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

Flexible Plan Investments Ltd. (FPI), founded in 1981, serves as the sub-adviser to the Quantified Family of mutual funds. It specializes in providing dynamic, risk-managed investment solutions to individuals and institutions. With approximately \$1.5 billion in assets under management (as of Dec. 31, 2023), FPI is a recognized leader in tactical asset management.

## **About Eckhardt Trading Company**

Founded in 1991 by Bill Eckhardt, Eckhardt Trading Company has been a leader in the development of managed futures trading systems. The firm's research-driven approach focuses on capturing global market trends across various asset classes. With over 30 years of experience, Eckhardt Trading Company continues to deliver innovative solutions to institutional investors worldwide.

## **Important Disclosures**

These materials have been independently produced by Flexible Plan Investments, Ltd. Flexible Plan is independent of, and has no affiliation with, Charles Schwab and Co., Inc. or any of its affiliates ("Schwab"). Schwab is a registered broker-dealer and member SIPC. Schwab has not created, supplied, licensed, endorsed, or otherwise sanctioned these materials nor has Schwab independently verified any of the information in them. Flexible Plan Investments provides you with investment advice, while Schwab maintains custody of your assets in a brokerage account and will effect transactions for your account on our instruction.

There is no guarantee the fund will achieve its investment objective. There is no guarantee that any investment strategy will generate a profit or prevent a loss. An investment in the Fund entails risk, including loss of principal.

***An investor should carefully consider the investment objectives, risks, charges and expenses of the Quantified 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 in the Quantified Funds.***

High portfolio turnover may result in higher transaction costs and higher taxes when fund shares are held in a taxable (non-qualified) account. Such costs are not reflected in annual fund operating expenses and may affect the Fund's performance.

Risks specific to investing in the Quantified Eckhardt Managed Futures Strategy Fund include: Subadviser's Investment Strategy Risk, Active and Frequent Trading Risk, Aggressive Investment Techniques Risk, Asset-Backed Securities Risk, Commodity Risk, Convertible Bond

Risk, Counterparty Risk, Credit Risk, Derivatives Risk Generally, Equity Securities Risk, Futures Contracts Risk, Foreign Securities Risk, Interest Rate Risk, Inverse Risk, Leverage Risk, Lower-Quality Debt Securities Risk, Market Risk, No History of Operations Risk, Non-Diversification Risk, Prepayment Risk and Mortgage-Backed Securities Risk, Risks of Investing in Other Investment Companies and Commodity Pools, Swaps Risk, Taxation Risk, Turnover Risk, U.S. Government Securities Risk, and Wholly Owned Subsidiary Risk. For complete details regarding the risks and expenses of the Fund, please refer to the prospectus.

Flexible Plan Investments, Ltd. serves as subadvisor to the Quantified Funds, distributed by Ceros Financial Services, Inc. (Member FINRA/SIPC). Flexible Plan Investments, Ltd. and Ceros are not affiliated.

Advisors Preferred, LLC serves as investment advisor to the Quantified Funds. Advisors Preferred is a commonly held affiliate of Ceros. Gemini Fund Services is the transfer agent to the Funds and is not affiliated with the advisor, subadvisor or distributor.

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