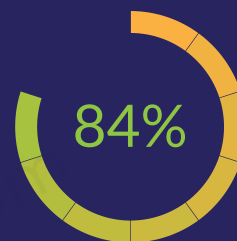


# Flexible Plan Investments

TRUST SCORE



Flexible Plan Investments, federally registered in 1984, is a Registered Investment Advisor (RIA) in 52 state(s) with a licensed staff of 4 advisors. Flexible Plan Investments manages \$2 billion and provides investment advisory services for 20,233 clients (1:5059 advisor/client ratio).

Flexible Plan Investments requires a \$25,000 minimum investment and charges a blended rate between 2.00% and 0.70% for ongoing portfolio management services, depending on the size of the portfolio.

## BENEFITS

- Firm uses a transparent fee-only model
- Firm has \$1B or more in assets under management
- Firm has been federally registered for 34 years
- Firm services over 1,000 clients
- Firm does not have a disciplinary history
- Firm does not have any misdemeanor convictions
- Firm does not have any felony convictions
- Firm does not have an insurance agent conflict
- Firm does not have an attorney conflict
- Firm does not accept performance-based fees
- Firm does not perform side-by-side management

## CONSIDERATIONS

- There is only one licensed advisor for every 5059 clients (industry average 1:50)
- Communications sent to the firm's website are not secure and encrypted
- Custodian is unknown

## BENEFITS (cont.)

Firm does not privately manage or own the products they recommend

Firm does not offer proprietary products

Firm does not receive soft dollar benefits

## CONSIDERATIONS (cont.)