ADVISOR SERVICES

Money Manager Directory

Q1 2025

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Questions or changes can be directed to **AAS-mmx@axosadvisorservices.com**

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Premier Managers

*models listed here feature managers without an additional overlay fee or that have a reduced model fee.

Flexible Plan Investments

Trent Schield
(248) 939-5598
tschield@flexibleplan.com
flexibleplan.com

QFC All Weather Dynamic Leveraged
QFC All Weather Static
QFC Classic
QFC Classic Faith Focused
QFC Common Ground Aggressive
QFC Common Ground Balanced
QFC Common Ground Conservative
QFC Common Ground Growth
QFC Common Ground Moderate
QFC Faith Focused Investing Aggressive
QFC Faith Focused Investing Balanced
QFC Faith Focused Investing Conservative
QFC Faith Focused Investing Growth
QFC Faith Focused Investing Moderate
QFC For a Better World Balanced
QFC For a Better World Conservative
QFC For a Better World Growth
QFC Low Volatility/Rising Dividends
QFC Market Leaders Aggressive
QFC Market Leaders Balanced
QFC Market Leaders Conservative
QFC Market Leaders Growth
QFC Market Leaders Moderate
QFC Market Leaders Sector Growth Ultra
QFC Multi-Strategy Core Aggressive
QFC Multi-Strategy Core Balanced
QFC Multi-Strategy Core Conservative
QFC Multi-Strategy Core Growth
QFC Multi-Strategy Core Moderate
QFC Multi-Strategy Explore: Equity Trends
QFC Multi-Strategy Explore: Low Correlation
QFC Multi-Strategy Explore: Low Volatility
QFC Multi-Strategy Explore: Special Equity
QFC Multi-Strategy Portfolio Aggressive
QFC Multi-Strategy Portfolio Balanced
QFC Multi-Strategy Portfolio Conservative
QFC Multi-Strategy Portfolio Growth
QFC Multi-Strategy Portfolio Moderate Growth
QFC TVA Gold
Strategic High Yield Bond
Volatility Adjusted NASDAQ

Horizon Investments, LLC

Austin Fitch
(866) 371-2399
afitch@horizoninvestments.com
HorizonInvestments.com

Custom SMA
ETF Conservative
ETF Conservation Plus
ETF Focused
ETF Focused + Risk Assist
ETF Growth
ETF Growth + Risk Assist
ETF Moderate
ETF Moderate + Risk Assist
ETF Real Spend – 3
ETF Real Spend – 4
ETF Real Spend – 5
ETF Real Spend – 6
ETF Real Spend – 7
GAIN Conservative (Domestic)
GAIN Focused (Domestic)
GAIN Growth (Domestic)
GAIN Moderate (Domestic)
GAIN Conservative Plus (Domestic)
Hybrid Conservative
Hybrid Conservation Plus
Hybrid Focused
Hybrid Focused + Risk Assist
Hybrid Growth
Hybrid Growth + Risk Assist
Hybrid Moderate
Hybrid Moderate + Risk Assist
Hybrid Real Spend – 3
Hybrid Real Spend – 4
Hybrid Real Spend – 5
Hybrid Real Spend – 6
Hybrid Real Spend – 7

Kensington Asset Management

Brian Weisenberger
(512) 661-7117
bweisenberger@kensingtonassetmanagement.com
kensingtonassetmanagement.com

Active Advantage
Dynamic Growth Strategy
Managed Income Strategy

Potomac

Jeff Goodnow
(936) 249-6726
jeff@potomac.com
Potomac.com

Bull Bear
Guardian
Income Plus
Navigrowth

MMX Program Fee

*models listed here are subject to a program fee and model fee (if applicable) that is to be paid by RIA or client.

Franklin Templeton

Daniel Ruggiero
(212) 805-6007
Daniel.Ruggiero@franklintempleton.com
clearbridge.com

ClearBridge Dividend Strategy Portfolios
ClearBridge International Growth ADR Portfolios
ClearBridge Large Cap Growth Portfolios
ClearBridge Mid Cap Portfolios
ClearBridge Multi Cap Growth Portfolios
Royce Premier

Invesco Investment Solutions

Christopher Diana
(212) 323-4964
Christopher.diana@invesco.com
Invesco.com

Invesco BulletShares Corporate 0-3 Year Portfolio
Invesco BulletShares Corporate 0-5 Year Portfolio
Invesco BulletShares Corporate 0-7 Year Portfolio
Invesco BulletShares Corporate 0-10 Year Portfolio
Invesco BulletShares Municipal 0-3 Year Portfolio
Invesco BulletShares Municipal 0-5 Year Portfolio
Invesco BulletShares Municipal 0-7 Year Portfolio
Invesco BulletShares Municipal 0-10 Year Portfolio
Invesco Dynamic Active/Passive 20/80 Portfolio
Invesco Dynamic Active/Passive 40/60 Portfolio
Invesco Dynamic Active/Passive 60/40 Portfolio
Invesco Dynamic Active/Passive 80/20 Portfolio
Invesco Dynamic Active/Passive 100/0 Portfolio
Invesco Dynamic ETF 0/100 Portfolio
Invesco Dynamic ETF 10/90 Portfolio
Invesco Dynamic ETF 20/80 Portfolio
Invesco Dynamic ETF 30/70 Portfolio
Invesco Dynamic ETF 40/60 Portfolio
Invesco Dynamic ETF 50/50 Portfolio
Invesco Dynamic ETF 60/40 Portfolio
Invesco Dynamic ETF 70/30 Portfolio
Invesco Dynamic ETF 80/20 Portfolio
Invesco Dynamic ETF 90/10 Portfolio
Invesco Dynamic ETF 100/0 Portfolio
Invesco Dynamic U.S. Factor Rotation Portfolio

Green Alpha Advisors

Betsy Moszeter
(720) 716-4553
betsy@greenalphaadvisors.com
greenalphaadvisors.com

Growth & Income

Money Manager List

*models listed here are only subject to a model fee that is to be paid by RIA or client.

Atlas Capital Management
Josh Kneller
(260) 637-2857
Josh@acmc.biz
atlascapitalmanagement.com

All Funds Growth
Alternative
Aviator
Bond Income
BRI All Funds Growth
BRI Bond Income
BRI Classic
BRI Classic-Gold
BRI Equity Growth
BRI High Yield
BRI Perpetual Equity Growth
BRI Perpetual World Equity Growth
BRI Quest
Classic
Classic Long/Short
Classic-Gold 1X NASDAQ 100
Classic-Gold 2X NASDAQ 100
Classic-Gold 1X S&P 500
Classic-Gold 2X S&P 500
Crescendo
Elevation
Encore
Equity Growth
Fixed Income
Gold
High Yield
High Yield Long/Short
Municipal Bonds High Yield
Oil
Perpetual Equity Growth
Perpetual World Equity Growth
Precious Metals 1.0X
Precious Metals 1.5X
Precious Metals Long 1.0X/Short-1.0X
Precious Metals Long 1.5X/Short-1.0X
Quest
Silver

B. Riley Wealth Portfolio Advisors
Paul Dietrich
(540) 905-5858
pdietrich@brileywealth.com
brileyfin.com

Fairfax Global Balanced Value Stock Strategy
Fairfax Global Permanent Portfoli-Bond Alternative Strategy
Fairfax Global Trends ETF Strategy
Fairfax Global Value Stock Strategy

BTS Asset Management
Brendan Scarafone
(800) 343-3040
bscarafone@btsmanagement.com
btsmanagement.com

Enhanced Equity Income
Gold Tactical Asset Allocation
Managed Income Portfolio
Select Bond Asset Allocation
Select Seasonality/Bond Asset
Tax Advantaged BAA

Crescat Portfolio Management
Brian McKelvey
(303) 350-4116
bmckelvey@crescat.net
crescat.net

Large Cap Strategy

Crosspoint Capital Strategies
Tony Cantando
(415) 291-2912
tony@crosspointcom.com
crosspointcm.com

Crosspoint Accelerated Growth
Crosspoint Tactical All-Cap

Day Hagan/Ned Davis Research
Art Day
(941) 330-1702
Art.Day@DayHagan.com
dayhagan.com

Global Asset Allocation Aggressive
Global Asset Allocation Conservative
Global Asset Allocation Moderate
Smart Fixed Income
Smart Sector w/ Catastrophic Stop
Smart Value

Earth Equity Advisors
Peter Krull
(877) 235-3684
pete@earthequityadvisors.com
earthequity-mmx.com

Core Aggressive
Core Balanced
Core Conservative
Global Equity
Green Sage Sustainability Portfolio

Focus Point Capital

Kevin Campbell
(480) 390-8400
kcampbell@focuspointcap.com
focuspointcap.com

FPC Macro

Frontier Asset Management

Gabrielle Wollert
(307) 673-5675
frontierasset.com

Frontier Balanced ETF Strategy
Frontier Balanced Strategy
Frontier Capital Preservation ETF Strategy
Frontier Capital Preservation Strategy
Frontier Conservative ETF Strategy
Frontier Conservative Income Strategy
Frontier Conservative Strategy
Frontier Faith-Based Balanced Strategy
Frontier Faith-Based Conservative Strategy
Frontier Faith-Based Global Opportunities Strategy
Frontier Faith-Based Long-Term Growth Strategy
Frontier Faith-Based Moderate Growth Strategy
Frontier Global Opportunities ETF Strategy
Frontier Global Opportunities Strategy
Frontier Long-Term Growth ETF Strategy
Frontier Long-Term Growth Strategy
Frontier Moderate Growth ETF Strategy
Frontier Moderate Growth Strategy
Frontier Tax-Managed Balanced Strategy
Frontier Tax-Managed Capital Preservation Strategy
Frontier Tax-Managed Conservative Income Strategy
Frontier Tax-Managed Conservative Strategy
Frontier Tax-Managed Global Opportunities Strategy
Frontier Tax-Managed Long-Term Growth Strategy
Frontier Tax-Managed Moderate Growth Strategy

Howard Capital Management

Zachary Stout
(770) 642-4902
zachary@howardcm.com
howardcm.com

All American Balanced
All American Conservative
All American Growth ALP Aggressive
ALP Balanced
ALP Conservative
ALP Growth
Dividend Income Balanced
Dividend Income Conservative
Dividend Income Growth
Horizon Income
ILP ETF Balanced
ILP ETF Conservative
ILP ETF Growth
ILP MF Balanced
ILP MF Conservative
ILP MF Growth
Ultra Aggressive
Viper 2 Aggressive
Viper 2 Balanced
Viper 2 Conservative
Viper 2 Growth

Manning & Napier

Frank Lesczinski
(585) 794-5152
flesczinski@manning-napier.com
manning-napier.com

Conservative Growth
Core Equity – Unrestricted
Disciplined Value – Unrestricted
Disciplined Value – US
Equity-Focused Blend
Equity-Oriented
Growth and Reduced Volatility
Long-Term Growth
Managed Conservative Growth
Managed ETF Equity Focused Growth
Managed ETF Income
Managed ETF Long Term Growth
Managed ETF Maximum Growth
Managed ETF Moderate Growth
Strategic Income Moderate
U.S. Core Equity

Morningstar Investment Services

Sarah Weese
(312) 348-2044
sarah.weese@morningstar.com
mp.morningstar.com/en-us/portfolios/all

Absolute Return
Active/Passive Aggressive Growth
Active/Passive Aggressive Growth Tax Sensitive
Active/Passive Conservative
Active/Passive Conservative Tax Sensitive
Active/Passive Growth
Active/Passive Growth Tax Sensitive
Active/Passive Income & Growth
Active/Passive Income & Growth Tax Sensitive
Active/Passive Moderate Growth
Active/Passive Moderate Growth Tax Sensitive
Aggressive Growth

Aggressive Growth Tax Sensitive
Conservative Tax Sensitive
ETF Aggressive Growth
ETF Aggressive Growth Tax Sensitive
ETF Conservative
ETF Conservative Tax Sensitive
ETF Growth
ETF Growth Tax Sensitive
ETF Income & Growth
ETF Income and Growth Tax Sensitive
ETF Moderate Growth
ETF Moderate Growth Tax Sensitive
Growth
Growth Tax Sensitive
Income and Growth
Income and Growth Tax Sensitive
Moderate Growth
Moderate Growth Tax Sensitive
Retirement Income Long-Range
Retirement Income Mid-Range
Retirement Income Short-Range
Retirement Income Ultra Short-Range
Select Equity All Cap Equity
Select Equity Dividend
Select Equity Dividend Non-MLP
Select Equity Hare
Select Equity Hare Non-MLP
Select Equity International Equity ADR
Select Equity Small/Mid Cap
Select Equity Tortoise
Select Equity Tortoise Non-MLP

Ocean Park Asset Management, Inc.

Tiana Brenneise
(661) 904-9011
tiana.brenneise@sierrainvestment.com
oceanparkam.com

Conservative Allocation
Global Balanced 40-60
Global Balanced 50-50
Global Balanced 60-50
Growth
High Yield Corporate
Moderate Allocation
Moderate Growth
Municipal Bond
Strategic Income
Tactical Bond

Optimus Advisory Group

Paul Hewitt
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paul@optimusadvisory.com
optimusadvisory.com

Dynamic Equity
Equity
Equity Rotation
Global Focus
Growth
Innovation
Tactical Bond
Tactical High Yield

Q3 Asset Management Corporation

Adam Quiring
(248) 566-1122
aquiring@q3tactical.com
q3tactical.com

Active Bond Rotation
Active Index Rotation
Adaptive High Yield
Alternative Edge
Bull Cipher
Cipher
EA Sector Conservative
EA Sector Growth
EA Sector Moderate
Enhanced Sector ETF Conservative
Enhanced Sector ETF Growth
Enhanced Sector ETF Moderate
Faith Based Growth
Lion Multi-Strategy Growth
Managed Income Rotation
Mercury
Power Momentum Blue Chip
Power Momentum Rising Dividend
Power Momentum NASDAQ 100
SA Sector Conservative
SA Sector Growth
SA Sector Moderate
Strategic Core Balanced
Strategic Core Growth
Strategic Sector ETF Conservative
Strategic Sector ETF Growth
Strategic Sector ETF Moderate
Tactical High Yield
Tactical SPX
Tactical Unconstrained Growth
Tactical Unconstrained Growth Rydex
Tax Advantaged Income

TUG1
TUG2
Voyage 2060
Voyage Cash Balance Strategy
Voyage Conservative
Voyage Growth
Voyage Moderate

Scarecrow Trading

Ben Fox
(952) 250-7463
benfox@scarecrowtrading.com
scarecrowtrading.com

Crow Chaser
High 5

Symmetry Partners, LLC

Tom Romano
(860) 734-2060
tromano@symmetrypartners.com
symmetrypartners.com

AltAxis Strategy
Non-Qualified (Tax-Managed) Bond
International PrecisionEquity ETF
Panoramic 0/100
Panoramic 10/90
Panoramic 20/80
Panoramic 30/70
Panoramic 40/60
Panoramic 50/50
Panoramic 60/40
Panoramic 70/30
Panoramic 80/20
Panoramic 90/10
Panoramic 100/0
PrecisionCore ETF 0/100
PrecisionCore ETF 10/90
PrecisionCore ETF 20/80
PrecisionCore ETF 30/70
PrecisionCore ETF 40/60
PrecisionCore ETF 50/50
PrecisionCore ETF 60/40
PrecisionCore ETF 70/30
PrecisionCore ETF 80/20
PrecisionCore ETF 90/10
PrecisionCore ETF 100/0
PrecisionCore ETF Tax-Managed 0/100
PrecisionCore ETF Tax-Managed 10/90
PrecisionCore ETF Tax-Managed 20/80
PrecisionCore ETF Tax-Managed 30/70
PrecisionCore ETF Tax-Managed 40/60
PrecisionCore ETF Tax-Managed 50/50
PrecisionCore ETF Tax-Managed 60/40
PrecisionCore ETF Tax-Managed 70/30
PrecisionCore ETF Tax-Managed 80/20
PrecisionCore ETF Tax-Managed 90/10
PrecisionCore ETF Tax-Managed 100/0
PrecisionCore Bond ETF
PrecisionCore Bond Tax-Managed ETF
Qualified (Non-Tax-Managed) Bond
Tax-Managed Panoramic 0/100
Tax-Managed Panoramic 10/90
Tax-Managed Panoramic 20/80
Tax-Managed Panoramic 30/70
Tax-Managed Panoramic 40/60
Tax-Managed Panoramic 50/50
Tax-Managed Panoramic 60/40
Tax-Managed Panoramic 70/30
Tax-Managed Panoramic 80/20
Tax-Managed Panoramic 90/10
Tax-Managed Panoramic 100/0
U.S. PrecisionEquity ETF

Zack's Investment Management

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All Cap Core
Dividend
Focus Growth
Mid Cap
Small Cap

ADVISOR SERVICES

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