A Smarter Way to Invest®

We work with financial professionals and individual investors to provide a rules based investment strategy focused on identifying US equities with strong financial statements and industry leadership.

The model that powers our strategy removes emotions from the investing process, allowing investors to focus on long term benefits of being a diversified, growth oriented investor.

About //

FormulaFolios has found that controlling emotions as an investor can be the most important factor in long term investing success. Our work is rooted in research, which is then used to build 100% mechanical investing models. By removing investing prejudices with our model based approach, we feel investors can substantially increase their probability of success.

Jason Wenk

Jason Wenk is the founder of FormulaFolio Investments. Prior to FormulaFolios, he worked for Morgan Stanley, and also founded Retirement Wealth Advisors (an SEC Registered Investment Advisor) in 2002.

Read more //

Derek Prusa

Mr. Prusa is the Senior Market Analyst for FormulaFolio Investments where he works diligently to research and monitor financial market conditions and select the best investment strategies for each of FormulaFolios' proprietary models. Mr. Prusa also provides valuable insight to the affiliated advisors and clients of FormulaFolios by producing accessible and understandable weekly, monthly, and quarterly market commentary summaries.

Read more //

(https://formulafoliofunds.com)

FORMULAFOLIOS US EQUITY FUND
FORMULAFOLIOS US EQUITY PORTFOLIO

We would love to hear from you. Please do not hesitate to contact us for any comments or questions.

Jason Crump: jcrump@formulafolios.com (mailto:jcrump@formulafolios.com)
Support: support@formulafolios.com (mailto:support@formulafolios.com)
Phone: 888-562-8880

FormulaFolio Investments LLC
89 Ionia NW, Suite 600 Grand Rapids, MI 49503

Mutual Funds involve risk including the possible loss of principal.

Investments in foreign securities could subject the Fund and Portfolio to greater risks including, currency fluctuation, economic conditions, and different governmental and accounting standards. In addition to the risks generally associated with investing in securities of foreign companies, countries with emerging markets also may have relatively unstable governments, social and legal systems that do not protect shareholders, economies based on only a few industries, and securities markets that trade a small number of issues. Adverse changes in currency exchange rates may erode or reverse any potential gains from the Fund and Portfolio's investments. Non-diversification risk may result in the Fund and Portfolio being more vulnerable to events affecting a single issuer.

The Fund and Portfolio will use model-based strategies that, while historically effective, may not be successful on an ongoing basis or could contain unknown errors. In addition, the data used in models may be inaccurate.

The Portfolio is an Investment vehicle for variable annuity contracts and may be subject to fees or expenses that are typically charged by these contracts. Please review the insurance contract prospectus for further description of these fees and expenses. This product is available as a sub-account investment to a variable life insurance policy only and is not offered directly to the general public.

Investors should carefully consider the investment objectives, risks, charges and expenses of the FormulaFolios US Equity Fund and FormulaFolios US Equity Portfolio. This and other important information about the Fund and Portfolio are contained in the prospectus, which can be obtained on this website. The prospectus should be read carefully before investing. The FormulaFolios US Equity Fund and Portfolio are distributed by Northern Lights Distributors, LLC, Member FINRA (http://www.finra.org/)/SIPC (http://sipc.com/). FormulaFolio

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The S&P 500 is an unmanaged, capitalization-weighted index. Performance figures assume reinvestment of capital gains, dividends, but do not include any fees or expenses. It is not possible to invest directly in the S&P 500.

The Russell 3000 Growth Index measures performance of the broad growth segment of the U.S. equity universe. The Russell 3000 Value Index measures performance of the broad value segment of the U.S. equity universe. These indices are respectively subsets of the Russell 3000 Index. Both are unmanaged indices.

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