



The Best of Active and Passive Management



[THE ELM STORY \(HTTPS://ELMFUNDS.COM/ABOUT-ELM/THE-ELM-STORY/\)](https://elmfunds.com/about-elm/the-elm-story/)

[HOW WE INVEST \(HTTPS://ELMFUNDS.COM/ABOUT-ELM/HOW-WE-INVEST/\)](https://elmfunds.com/about-elm/how-we-invest/)

[REQUEST INFO](#)

Sensible

Disciplined
Diversified
Dynamic

Efficient

Built with index funds & ETFs
Management fee of 0.12% / year
Tax aware

Secure

Your own Account at Fidelity
Daily liquidity & full access
\$300,000 minimum

SIGN UP ONLINE
([HTTPS://ELMFUNDS.COM/INVEST/](https://ELMFUNDS.COM/INVEST/))



Take the next step to Active Index Investing®

Download our investor presentation or invest with us online.

[REQUEST INFO](#)

[INVEST WITH US \(HTTPS://ELMFUNDS.COM/INVEST/\)](https://ELMFUNDS.COM/INVEST/)

[SCHEDULE A CALL \(HTTPS://ELMFUNDS.COM/CONTACT-US/SCHEDULE-A-CALL/\)](https://ELMFUNDS.COM/CONTACT-US/SCHEDULE-A-CALL/)

Elm Partners' Funds are available only to accredited investors. The content of this website and related materials are not intended to solicit investment, but rather to elicit discussion and exploration of better ways to invest. The contents of this website do not comprise an offering document. Neither historical simulations nor past return performance are necessarily indicative of future returns. Elm Partners Management LLC is an investment advisor registered with the SEC. Here are the most recent copies of our Form [ADV Part 1 \(https://elmfunds.com/uploads/2019/03/FormADV1_ElmPartners_20190322.pdf\)](https://elmfunds.com/uploads/2019/03/FormADV1_ElmPartners_20190322.pdf) and [ADV Part 2A2B \(https://elmfunds.com/uploads/2019/03/FormADV2A2B_ElmPartners_20190322.pdf\)](https://elmfunds.com/uploads/2019/03/FormADV2A2B_ElmPartners_20190322.pdf).

Fidelity Investments is an independent company, unaffiliated with Elm Partners. Fidelity Investments is a service provider to Elm Partners. There is no form of legal partnership, agency affiliation, or similar relationship between your financial advisor and Fidelity Investments, nor is such a relationship created or implied by the information herein. Fidelity Investments has not been involved with the preparation of the content supplied by Elm Partners and does not guarantee, or assume any responsibility for, its content. Fidelity Investments is a registered trademark of FMR LLC. Fidelity Clearing & Custody Solutions® provides clearing, custody, and other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC. [eReview number 830247.2.0].

Here is the most recent revision of our [Privacy Policy \(https://elmfunds.com/privacy-policy/\)](https://elmfunds.com/privacy-policy/).

[#ELMFUNDS.COM/CONTACT-US/](https://ELMFUNDS.COM/CONTACT-US/)

[#ELMFUNDS.COM/WORK-FOR-](https://ELMFUNDS.COM/WORK-FOR-)

[//ELMFUNDS.COM/ABOUT-](https://ELMFUNDS.COM/ABOUT-)

[#ELMFUNDS.COM/INVESTORS/INSTITUTIONAL-](https://ELMFUNDS.COM/INVESTORS/INSTITUTIONAL-)

[#ELMFUNDS.COM/COOKIE-](https://ELMFUNDS.COM/COOKIE-)



(<http://twitter.com/elmpartners>)



(<https://www.linkedin.com/company/9457671>)

