

# RISK MANAGED STRATEGY FUNDS

## SIMPLE, YET COMPREHENSIVE

SEE OUR FUNDS  
([HTTP://WWW.EVALUATORFUNDS.COM/FUNDS/](http://www.evaluatorfunds.com/funds/))

### OVERVIEW

#### We Believe Investing Should Be Easy

The **E-Valuator Risk Managed Strategy (RMS) Funds** make investing easy for Investors by providing 6 distinctly different investment options spanning the efficient frontier spectrum of risk management from Very Conservative to Aggressive Growth. Investors simply need to identify their personal level of acceptable volatility (risk) exposure, then invest accordingly in the RMS Fund(s) matching their tolerance level.

#### We Believe In a Systematic Approach to Intelligent Investing

We manage **The E-Valuator Risk Managed Strategy (RMS) Funds** with a disciplined, pragmatic approach seeking to maximize performance within a stated range of volatility, as measured by standard deviation. Our Meticulous Asset Allocation Process (MAAP) provides the guidance in the form of a "road map" through the asset allocation and diversification process.

#### We Strive To Simplify the Process

The **E-Valuator Risk Managed Strategy (RMS) Funds** were created to simplify a comprehensive asset management process, without sacrificing performance. Accordingly, each of The E-Valuator RMS Funds contains a complete asset management program packaged into an open-end mutual fund.

### DOWNLOADS



REPORT\_.PDF)

([HTTPS://WWW.EVALUATORFUNDS.COM/WP-CONTENT/UPLOADS/PERFORMANCE-](https://www.evaluatorfunds.com/wp-content/uploads/performance-report_.pdf)



([HTTPS://WWW.EVALUATORFUNDS.COM/WP-CONTENT/UPLOADS/Q1-2019-REPORT.PDF](https://www.evaluatorfunds.com/wp-content/uploads/q1-2019-report.pdf))

### AS SEEN IN

Forbes



MarketWatch



# THE E-VALUATOR RMS FUNDS ARE NOT TYPICAL MUTUAL FUNDS



## The E-Valuator Software

The E-Valuator software systematically selects, monitors, and replaces (as needed) the underlying investments, i.e. ETF's and open-end mutual funds.



## M.A.A.P.

Meticulous Asset Allocation Process. Establishes the "road map" for diversifying and allocating assets in a pragmatic, methodical manner.



## Optimized for Return

Seeking to maximize performance at varying levels of risk along the efficient frontier while utilizing both Passive Management and Active Management.



## Rebalancing

Underlying investments are rebalanced when their pro-rata balance of the Fund differs by +/-10% from their original allocation percentage.



## Replacement

These fund-of-funds investments continually monitor, identify, and replace underlying investments whenever performance lags below the criteria set by the E-Valuator software.



## Tax Harvesting

Proactively replace a lagging investment to potentially help reduce your taxable income.

## NEWS & INSIGHTS

## FUNDS

	Very Conservative	Conservative	Conservative/Moderate
<a href="https://www.evaluatorfunds.com/download/2018-q1-evaluator-rms-funds-fact-sheet/?wpdmdl=1192&amp;refresh=5d23c3056390d1562624773">Download</a> <a href="https://www.evaluatorfunds.com/download/2018-q1-evaluator-rms-funds-fact-sheet/?wpdmdl=1192&amp;refresh=5d23c3056390d1562624773">Fact Sheet</a>	<a href="https://www.evaluatorfunds.com/download/2018-q1-very-conservative-rms-factsheet/?wpdmdl=1185&amp;refresh=5d23c3056aaeb1562624773">Fact Sheet</a>	<a href="https://www.evaluatorfunds.com/download/2018-q1-conservative-rms-factsheet/?wpdmdl=1186&amp;refresh=5d23c3056f8a81562624773">Fact Sheet</a>	<a href="https://www.evaluatorfunds.com/download/2018-q1-tactical-rms-fact-sheet/?wpdmdl=1191&amp;refresh=5d23c30574cdc1562624773">Fact Sheet</a>
Equity Allocation	0% – 15%	15% – 30%	30% – 50%
RMS Fund Objectives			
Primary	Income	Income	Income
Secondary	Stability of Principal	Growth	Growth
Investor Suitability			
Liquidation Target Date	Less than 2 yrs.	2 yrs. to 4 yrs.	4 yrs. to 6 yrs.
Short-Term Loss Tolerance	Very Low	Low	Moderate
Stock Market Risk Exposure	Minimal	Below Average	Below Average
Inflation Risk Exposure	Significant	Above Average	Above Average
Std. Deviation Goal			
3 yr. and/or 5 yr.	1.0% – 3.5%	2.5% – 5.0%	4.0% – 6.5%

	Very Conservative	Conservative	Conservative/Moderate
Ticker Symbols & Summary Prospectuses	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-very-conservative-service-class-summary-prospectus/?wpdmdl=1194&amp;refresh=5d23c3059114d1562624773">EVVLX</a></p>	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-conservative-service-class-summary-prospectus/?wpdmdl=1196&amp;refresh=5d23c3059b01c1562624773">EVCLX</a></p>	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-tactically-managed-service-class-summary-prospectus/?wpdmdl=1205&amp;refresh=5d23c3059f92c1562624773">EVTTX</a></p>
Service Share Class	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-very-conservative-r4-class-summary-prospectus/?wpdmdl=1195&amp;refresh=5d23c305b2edc1562624773">EVVCLX</a></p>	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-conservative-r4-class-summary-prospectus/?wpdmdl=1197&amp;refresh=5d23c305b7eb31562624773">EVCLX</a></p>	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-tactically-managed-r4-class-summary-prospectus/?wpdmdl=1206&amp;refresh=5d23c305be491562624773">EVTTX</a></p>
R4 Share Class	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-very-conservative-r4-class-summary-prospectus/?wpdmdl=1195&amp;refresh=5d23c305b2edc1562624773">EVVCLX</a></p>	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-conservative-r4-class-summary-prospectus/?wpdmdl=1197&amp;refresh=5d23c305b7eb31562624773">EVCLX</a></p>	<p><a href="https://www.evaluatorfunds.com/download/2018-evaluator-tactically-managed-r4-class-summary-prospectus/?wpdmdl=1206&amp;refresh=5d23c305be491562624773">EVTTX</a></p>

## FOR THE INVESTOR, IT'S SIMPLE.

In essence, The E-Valuator Risk Managed Strategy Funds provide a cost-effective asset allocation service for its shareholders.

**Kevin R. Miller**

CEO Systelligence & Portfolio Manager  
The E-Valuator Risk Managed Strategy Funds