

Simplify Investing

Actively managed portfolios of funds designed to help you reach your goals.

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Our suite of mutual funds are designed to help you meet your unique goals. Looking to grow your retirement account? Interested in sustainable investing? Want a balanced fund designed to navigate changing markets? Our funds can help you move forward.

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Aggressive Upgrader

FUNDX

Upgrader

SRIFX

Sustainable Impact

RELAX

Conservative Upgrader

TACTX

Tactical Upgrader

INCMX

Flexible Income

HOW TO INVEST

Available at Charles Schwab, Fidelity, Etrade, TD Ameritrade and Vanguard.

Minimum investment: \$1,000

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Janet Brown
President/CEO

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FUNDX INVESTMENT GROUP

FundX is a San Francisco-based asset management firm that has managed portfolios of funds for high-net-worth individuals, corporate retirement plans, and foundations since 1969.

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CONTACT FUNDX

Need help finding a fund that's right for you?

Contact FundX at
1-800-763-8639

Questions about your account?

Contact shareholder services at
1-866-455-3863

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policy, which incorporates an analysis of environmental, social and corporate governance factors, may result in the Fund foregoing opportunities to buy certain Underlying Funds when it might otherwise be advantageous to do so, or selling its holdings in certain Underlying Funds for sustainable impact investment reasons when it might be otherwise disadvantageous for it to do so. The Funds are subject to the same risks as the underlying funds and exchange-traded funds in which they invest including the risks associated with small companies, foreign securities, emerging market, debt securities, lower-rated and non-rated securities, sector emphasis, short sales and derivatives. ETFs are subject to additional risks that do not apply to conventional mutual funds, including the risks that the market price of an ETF's shares may trade at a discount to its net asset value, an active secondary trading market may not develop or be maintained, or trading may be halted by the exchange in which they trade, which may impact a Fund's ability to sell its shares.

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Fund holdings and sector allocations are subject to change and should not be considered a recommendation to buy or sell any security. Click the following links to view the funds' top 10 holdings: HOTFX, FUNDX, SRIFX, RELAX, TACTX, INCMX.

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