

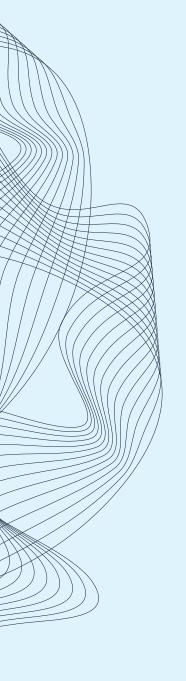
Money Manager Directory

Q3 2025

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Axos Advisor Services does not endorse or recommend any specific managers. Questions or changes can be directed to **AAS-mmx@axosadvisorservices.com**

Axos Advisor Services. 7103 South Revere Parkway, Centennial, CO 80112. Member FDIC



Premier Managers

Crosspoint Capital Strategies

Tony Cantando (415) 291-2912

tony@crosspointcom.com crosspointcm.com

Crosspoint Accelerated Growth Crosspoint Tactical All-Cap

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

Hvbrid 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

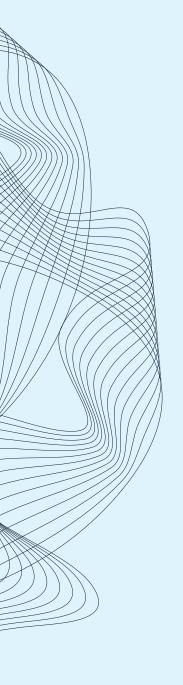
Active Advantage Kensington Dynamic Allocation Strategy Managed Income Strategy

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 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 BulletShares Municipal 0-10 Year Portfolio Invesco Dynamic Active/Passive 20/80 Portfolio Invesco Dynamic Active/Passive 40/60 Portfolio Invesco Dynamic Active/Passive 80/20 Portfolio Invesco Dynamic Active/Passive 80/20 Portfolio Invesco Dynamic Active/Passive 100/0 Portfolio

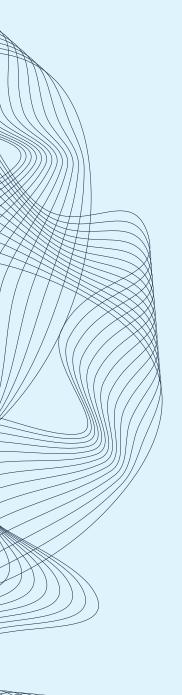
Invesco Dynamic Active/Passive 100/0 Portfolio
Invesco Dynamic ETF 0/100 Portfolio
Invesco Dynamic ETF 10/90 Portfolio
Invesco Dynamic ETF 20/80 Portfolio
Invesco Dynamic ETF 30/70 Portfolio
Invesco Dynamic ETF 40/60 Portfolio
Invesco Dynamic ETF 50/50 Portfolio
Invesco Dynamic ETF 60/40 Portfolio
Invesco 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 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

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

Fairfax Global Investment Management

Paul Dietrich

(540) 905-5858

paul.dietrich@wedbush.com

fairfax-global.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

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

AI P Growth

Dividend Income Balanced

Dividend Income Conservative

Dividend Income Growth

Horizon Income

ILP ETF Balanced

ILP ETF Conservative

ILP ETF Growth

II P 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

U.S. Core Equity

Morningstar Investment Management

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.

Jerrod DeShaw (310) 596-9770

jerrod.deshaw@oceanparkam.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

(949) 727-4734

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

FA 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

Trecisionoore ETT Tax Managed 00/40

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

James Fives (312) 265-9171 jfives@zacks.com

All Cap Core

zacksim.com

Dividend

Focus Growth

Mid Cap

Small Cap







Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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