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Access Fund Management, LLC

Protecting Your Assets and Success

Turmoil in the Middle East has global economic implications. Congress wrestles with budget cuts in an attempt to curb the record federal deficit. With so much uncertainty and lack of trust in the political and financial arenas, it's not just investors who are timid. So are many of the financial advisors to whom they turn for answers.

"It only took a few bad players in the industry to create this problem, but it will take investors and astute advisors to solve it," says Michael V. Williams, founder and president of Florida-based Access Fund Management, LLC (AFM).

"AFM is attracting national attention. Two pages are devoted to the firm in the *New York Times* bestselling book *Conquer the Crash: You Can Survive and Prosper in a Deflationary Depression*, by Robert R. Prechter, Jr."

"Most advisors and managers are in the 'relative return' world," says Joshua M. Williams, director of marketing. "If the market goes down 40 percent one year, and your portfolio 'only' goes down 30 percent, many advisors consider that a

transparency and liquidity," Michael V. Williams adds. "When applying our strategies, we expect to outperform the S&P 500 over a full market cycle, but with substantially less risk."

AFM creates combinations of disciplined managers with differing strategies who do not falter from their investment style. The firm utilizes Performex®, a software system that analyzes the risk attributes and performance histories of thousands of managers and strategies, then selects the proper combination designed to achieve predetermined risk and return objectives. While no system, in and of itself, can determine what or when to buy and sell, the Performex® System

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— Kenneth D. Trumpfheller,
Chief Investment Officer

assists AFM with their goal of achieving profitability in falling markets and excess returns over full market cycles, through proper alignment of offensive and defensive strategies.

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"We believe the underlying fundamentals of the marketplace are not good, and another shoe is going to drop, similar or worse than 2008," says Kenneth D. Trumpfheller, chief investment officer. "The goal of Access Fund Management is to be a safe harbor to high-net-worth investors, no matter what the market does."



Kenneth D. Trumpfheller, Michael V. Williams and Joshua M. Williams

Founded in 2002, AFM helps sophisticated investors and advisors seek to preserve and grow capital, while minimizing tax liabilities. The secret to the firm's success is a methodology of selecting proven managers/strategies designed to take advantage of market fluctuations, whether they are positive or negative.

Proper Allocation & Absolute Return vs. Relative Return

It is common for many investors and advisors to try to "time" the market, but in reality, such a strategy cannot succeed consistently. Access Fund Management believes in having proper allocations that can weather good and bad markets, without constantly reallocating.

relative return success, but we would say that's an absolute failure. We focus on 'absolute returns,' which judges success on how the investment performs over full market cycles, compared to its original price, not an index."

"Aside from our absolute return strategies, we have recently developed alternative models, which focus on managing the manager selection risk, reduce the market risk and provide increased



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