

RFM Financial Solutions, LLC

Simple IRA Plan Investment Choices

Fund Name	Investment Style	Morningstar Rating	Initial Investment
Amana Trust Income (AMANX)	Large Value	★★★★★	\$ 100
Yacktman Focused Fund (YAFFX)	Large Value	★★★★★	\$ 500
American Funds – Fundamental (AFIFX)	Large Blend	★★★★★	\$ 250
Amana Trust Growth (AMAGX)	Large Growth	★★★★★	\$ 100
Westcore Select (WTS LX)	Mid-Cap Growth	★★★★★	\$ 1
FBR Focus (FBRVX)	Mid-Cap Growth	★★★★★	\$ 1000
Janus Triton Fund Class T (JATTX)	Small Growth	★★★★★	\$ 1
Invesco Small Companies Fund Class A (ATIAX)	Small Blend	★★★★★	\$ 1
Heartland Value Plus Fund (HRVIX)	Small Value	★★★★★	\$ 1
Permanent Portfolio (PRPFX)	Conservative Allocation	★★★★★	\$ 1
Oakmark Equity & Income (OAKBX)	Moderate Allocation	★★★★★	\$ 1000
Icon Energy (ICENX)	Energy	★★★★★	\$ 1
Ivy Science & Tech (WSTYX)	Technology	★★★★★	\$ 500
BlackRock Health Sciences Ops (SHSAX)	Health	★★★★★	\$500
MFS International Value Fund (MGIAX)	Foreign Large Value	★★★★★	\$ 1
Mutual Discovery (TED1Z)	World Stock	★★★★★	\$ 250
American Funds – EuroPacific (AEGFX)	Foreign Large Blend	★★★★★	\$ 250
American Funds – Small World (SCWFX)	World Stock/Small Growth	★★★★★	\$250
Scout International (UMBWX)	Foreign Large Growth	★★★★★	\$ 1
First Eagle Global (SGENX)	World Allocation	★★★★★	\$ 1000
Pimco Total Return (PTTDX)	Intermediate Term Bond	★★★★★	\$ 1
Templeton Global Bond (TPICZ)	World Bond	★★★★★	\$ 1
Oppenheimer International Bond (OIBAX)	World Bond	★★★★★	\$ 1
Schwab Investor Money Fund (SWRXX)	Money Market	N/A	N/A