

This brochure supplement (Part 2B of Form ADV) provides biographies about the people in this firm that supplements the THE INDEX GROUP brochure. You should have received a copy of that brochure. Please contact 719-884-7500 if you did not receive THE INDEX GROUP's brochure or if you have any questions about the contents of this supplement.

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Education and Business Standards

THE INDEX GROUP seeks to hire employees who demonstrate honesty and integrity in everything that they do. It is our desire to match their jobs with the skills they are best at and enjoy doing the most. Most of the time we look for people who have excelled in education and in business.

Michael G. Willis, President & Lead Portfolio Manager

Date of birth: 05/11/1966

Education: Masters of Business Administration (MBA), California Polytechnic State University, 1991

- First Vice President - Investments, Smith Barney 1994-1999
- Senior Vice President - Investments, Paine Webber 1999-2003
- Senior Vice President - Investments, UBS Financial Services, Inc. 2003-2004
- President, The Willis Group 2004-Current^(L) President, Giant 5 Funds 2005-Current^(L) Lead Portfolio Manager, The Index Group (The Willis Group) 2004-2014
- Lead Portfolio Manager, Index Funds (Giant 5 Funds) 2006-Current

Supervision: Michael G. Willis is supervised by Ted Uhl, Chief Compliance Officer of Index Funds. He reviews Michael G. Willis's work through frequent office interactions as well as remote interactions. He also reviews Michael G. Willis's financial activities quarterly.