



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

Aggressive Growth Passive

The Aggressive Growth Passive Strategy:

With no fixed income exposure, this model is a higher risk solution for those clients who want a full exposure to equities in both U.S. and International markets

Fees

Strategy Fee 0.75 %

Advisor Fee _____ %

Total Fee _____ %

Signatures

Client Date

Client Date

Advisor Date

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