



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

Dividend

The Dividend Strategy seeks to provide income and total return through stock dividends and capital appreciation of equity holdings by targeting stocks believed to be undervalued by fundamental measures. The portfolio targets dividend income double the S&P 500.

Fees

Strategy Fee 0.95 %

Advisor Fee _____ %

Total Fee _____ %

Signatures

Client Date

Client Date

Advisor Date

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