



## STRATEGY SELECTION FORM

Client Name(s): \_\_\_\_\_

Account # (if known): \_\_\_\_\_

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### Strategy

**ESG Strategy**

**The ESG Strategy** is designed to help investors align their values with portfolio holdings by selecting equities based on both stock fundamentals and the impact those companies have on society and the environment.

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### Fees

Strategy Fee 0.75 %

Advisor Fee \_\_\_\_\_ %

Total Fee \_\_\_\_\_ %

### Signatures

\_\_\_\_\_  
**Client** **Date**

\_\_\_\_\_  
**Client** **Date**

\_\_\_\_\_  
**Advisor** **Date**

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