



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

Moderate Active

The Moderate Active Strategy: With half of the allocation dedicated to fixed income and the other half to a combination of U.S. and International ETFs, this model provides a balanced solution for clients looking for income and capital appreciation.

Fees

Strategy Fee 0.95 %

Advisor Fee _____ %

Total Fee _____ %

Signatures

Client **Date**

Client **Date**

Advisor **Date**

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