



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

Moderate Aggressive Active

The Moderate Aggressive Active Strategy contains a higher allocation to growth-oriented investments both in the U.S. and International markets and provides a solution for clients seeking higher equity exposure.

Fees

Strategy Fee 0.95 %

Advisor Fee _____ %

Total Fee _____ %

Signatures

Client Date

Client Date

Advisor Date

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