



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

Moderate Conservative Active

The Moderate Conservative Active Strategy contains a higher concentration of Global Fixed Income, which is a strategic combination of U.S. and International fixed income ETFs reduces equity market exposure for your more conservative clients.

Fees

Strategy Fee 0.95 %

Advisor Fee _____ %

Total Fee _____ %

Signatures

Client **Date**

Client **Date**

Advisor **Date**

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