

## STRATEGY SELECTION FORM

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

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

### Strategy

**Moderate Conservative Passive**

**The Moderate Conservative Passive 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 0.75 %

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

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

### Signatures

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

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

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

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