



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

Moderate Passive

The Moderate Passive 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 0.75 %

Advisor Fee _____ %

Total Fee _____ %

Signatures

Client **Date**

Client **Date**

Advisor **Date**

Kalos, Wildermuth Asset Management, and its affiliates do not guarantee any minimum level of investment performance or the success of any portfolio or investment strategy. Further, there can be no assurance that any portfolio will achieve its investment objective. Past performance does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's securities, when redeemed, may be worth more or less than their original cost. Depending upon unique and changing client and market situations we may customize the construction and implementation of the portfolios for particular clients. Therefore, your return may be materially different from that of other Kalos Management clients with the same investment objective and any comparative benchmark provided. Registration of an investment adviser does not imply any level of skill or training.

Securities offered through Kalos Capital, Inc., Member FINRA/SIPC/MSRB. Investment advisory services offered through Kalos Management, Inc., an SEC Registered Investment Adviser. Insurance products offered through Kalos Financial, Inc., a licensed insurance agency. These members of the Kalos Family of Companies are separate affiliated firms that share common ownership and are represented by the Kalos Financial service mark.