



## STRATEGY SELECTION FORM

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

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

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### Strategy

**U.S. Core**

**The U.S. Core Strategy** seeks to provide exposure to both value and growth-oriented positions by hand-selecting individual stocks found in our Dividend and Growth Portfolios and combining them into one portfolio. This strategy serves as a foundational piece to a client's portfolio.

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### Fees

Strategy Fee 0.95 %

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

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

### Signatures

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

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

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

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