



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

U.S. Fixed Income

The U.S. Fixed Income Strategy: We select a diversified mix of U.S. fixed income ETFs which have holdings with a variety of maturities, durations, and credit qualities.

Fees

Strategy Fee 0.75 %

Advisor Fee _____ %

Total Fee _____ %

Signatures

Client **Date**

Client **Date**

Advisor **Date**

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