



STRATEGY SELECTION FORM

Client Name(s): _____

Account # (if known): _____

Strategy

U.S. Market ETF

The U.S. Market ETF Strategy: We select a diversified mix of sector-based exposure to the U.S. equity markets. Individual ETFs and allocation percentages are subject to change based on market cycles.

Signatures

Fees

Strategy Fee 0.75 %

Advisor Fee _____ %

Total Fee _____ %

Client **Date**

Client **Date**

Advisor **Date**

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