



## STRATEGY SELECTION FORM

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

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

**Strategies (up to 5 strategies per account—total % cannot exceed 100%)**

**Strategy fee 0.95% Min \$25k (unless otherwise noted)**

- \_\_\_\_\_ % Liquid Endowment (min \$50k)
- \_\_\_\_\_ % U.S. Core Equity
- \_\_\_\_\_ % Moderate Conservative Active
- \_\_\_\_\_ % Moderate Active
- \_\_\_\_\_ % Moderate Aggressive Active
- \_\_\_\_\_ % Aggressive Growth Active
- \_\_\_\_\_ % Dividend
- \_\_\_\_\_ % Growth
- \_\_\_\_\_ % Equity Commodity
- \_\_\_\_\_ % Developed Country-Specific
- \_\_\_\_\_ % Emerging Country-Specific
- \_\_\_\_\_ % Global Fixed Income
- \_\_\_\_\_ % **Total**

**Strategy fee 0.75% Min \$25k**

- \_\_\_\_\_ % ESG
- \_\_\_\_\_ % Moderate Conservative Passive
- \_\_\_\_\_ % Moderate Passive
- \_\_\_\_\_ % Moderate Aggressive Passive
- \_\_\_\_\_ % Aggressive Growth Passive
- \_\_\_\_\_ % Dividend ETF
- \_\_\_\_\_ % Growth ETF
- \_\_\_\_\_ % U.S. Market ETF
- \_\_\_\_\_ % Developed Regional
- \_\_\_\_\_ % Emerging Regional
- \_\_\_\_\_ % U.S. Fixed Income
- \_\_\_\_\_ % International Fixed Income
- \_\_\_\_\_ % **Total**

**Fees**

**Total % Strategies at 0.95%** \_\_\_\_\_ %

**Total % Strategies at 0.75%** \_\_\_\_\_ %

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

**Signatures**

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

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

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

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