

## INVESTMENT ELECTION FORM

	Volatility (RISK)	Return	Account Name _____
	HIGH	HIGH	
○	↑	↑	<p><b>CAPITAL APPRECIATION</b></p>  <p><b>APPROPRIATE FOR:</b>          Long term investors          Young investors          No need for current income          Investors able to withstand high volatility</p>
○	↑	↑	<p><b>GROWTH</b></p>  <p><b>APPROPRIATE FOR:</b>          Moderate to long term investors          Young couples/families          Low need for income          Investors able to withstand moderate to high volatility</p>
○	↑	↑	<p><b>BALANCED</b></p>  <p><b>APPROPRIATE FOR:</b>          Moderate term investors          Middle age          Moderate need for income          Moderate tolerance toward volatility</p>
○	↑	↑	<p><b>INCOME &amp; GROWTH</b></p>  <p><b>APPROPRIATE FOR:</b>          Short to midterm investors          Mature investors          Moderate to high level of current income          Investors seeking low to moderate volatility</p>
○	↓	↓	<p><b>FIXED INCOME</b></p>  <p><b>APPROPRIATE FOR:</b>          Short term investors          High level of current income          Older investors          Investors who need low volatility</p>
	LOW	LOW	

 <b>EQUITY</b>	 <b>BONDS</b>	 <b>MONEY MARKET FUNDS</b>
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I certify that the above information is accurate and correct.

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Signature

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Date

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Signature

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Date

\*Asset allocation may vary over time. Historical performance can be provided by your investment manager.