



Using **DocuSign** is the preferred way to complete your request.

Sign via DocuSign

Or email this form to [service@geowealth.com](mailto:service@geowealth.com).

Use this form to invest in or change an existing model or create a model. Accounts will be automatically rebalanced as part of this process.

1. Select Instruction Type

Pre-Built Models

- Invest in EQIS Model
- Invest in other Pre-Built Model

OR

Advisor-Built Models

- Invest in existing model
- Change existing model
- Create a model

2. Select One Model

EQIS UMA Model

- Strategic
- Strategic Tax-Managed
- Dynamic Strategic
- Dynamic Sector
- Dynamic Tactical
- Income

EQIS ETF Model

- Strategic Growth
- Strategic Growth Plus Alternatives
- Dynamic
- Fixed Income
- Multi-Asset Income

OR

Enter name of other Pre-Built Model.

2. Name of Advisor-Built Model

New model name must be unique and cannot include client name or special characters. Acceptable example: Andrew’s Growth Model.

After selecting risk tolerance below, go on to page 2 to change existing model or create new model.

3. Select One Risk Tolerance

- Conservative
- Moderate Conservative
- Moderate
- Moderate Aggressive
- Aggressive

## 4. Enter the Sleeve Model/SMA Strategy/Pooled Vehicles and weights for your Advisor-Built Model

Leave blank if not changing a model or creating a new model.

Sleeve Model/SMA Strategy/Pooled Vehicle	Weight (%)
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Total	Must equal 100%
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## 5. Model Funding

Invest all available cash minus reserve for fees

Transfer all assets from current model in account

Invest \$

To include non-managed securities in the model funding, contact [service@geowealth.com](mailto:service@geowealth.com).

## 6. Accounts to subscribe to the model

Do not complete this section if you are only changing an existing Advisor-Built model, without adding or removing accounts currently subscribed to the model.

Account numbers are needed when subscribing accounts to a model of any kind for the first time.

List ONLY account numbers in the box below.

## Instructions Submitted By

Printed Name

Date (MM/DD/YYYY)

Advisor has trading Limited Power Of Attorney (LPOA). Client signature(s) **is not** required.

Advisor **does not** have trading Limited Power Of Attorney (LPOA). Client signature(s) **is** required.

By signing below, I/we ("Client") authorize GeoWealth Management LLC ("GeoWealth") to make changes to the referenced account ("Account") in relation to asset allocation weights and the selection of proprietary and third-party model portfolios, mutual funds, exchange traded funds and/or exchange traded products, as applicable, in accordance with these instructions. Client authorizes GeoWealth to effect changes with respect to Program type to the Account, including changing the Account to a Program that charges higher fees, as applicable.

In no event will GeoWealth be obligated to effect any transaction that would not otherwise be permitted under the applicable Program or take any action which GeoWealth believes in its discretion, would violate any applicable state or federal law, rule or regulation, or the rules or regulations of any self-regulatory body. Client agrees to indemnify and hold GeoWealth, its officers, directors, employees and affiliates harmless from and against any and all losses, costs, damages, liabilities and expenses (including reasonable attorney's fees) arising from, or related to, GeoWealth and its affiliates executing the instructions provided.

## Primary Account Owner/Trustee/Executor

Signature

Printed Name

Date (MM/DD/YYYY)

## Co-Account Owner/Co-Trustee/Co-Executor

Signature

Printed Name

Date (MM/DD/YYYY)