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1. Account Information

Client Name

Account Number

2. Tax Harvest Instructions

<u>A. Specify Tax Term:</u>	Short Term Only	Long Term Only	Both Short & Long Term	
Sell all tax lots that have:			Loss	Gain
Sell tax lots to realize \$		in:	Loss	Gain
Only sell tax lots that have a minimum of \$		in:	Loss	Gain
Raise \$		using tax lots that have:	Loss	Gain

B. Proceeds Instructions:

Your instruction will govern how proceeds from tax harvest sales are handled during the 31 day 'wash sale' period. After 31 days, the tax harvest proceeds will be automatically invested into the account's model(s).

Invest into an index ETF

iShares S&P 500 (IVV)

iShares Short Treasury Bond (SHV)

iShares Russell 2000 (IJR)

iShares National Muni Bond (MUB)

iShares MSCI EAFE (EFA)

iShares Core US REIT (USRT)

Invest in the custodian's taxable money fund

Invest in the custodian's tax exempt money fund

Do not automatically reinvest; leave in cash for a withdrawal. (Click [here](#) for the withdrawal form)

Special Instructions

Instructions Submitted By

Print 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, the undersigned authorizes GeoWealth Management, LLC (“GeoWealth”) to effect transactions in accordance with these instructions and agrees to indemnify and hold GeoWealth harmless for acting on these instructions.

Client understands that investment returns will fluctuate and are subject to market volatility, meaning that shares, when redeemed or sold, may be worth more or less than their original cost. Client should consider whether to utilize tax harvesting based on their particular circumstances and the potential impact tax harvesting may have on their federal income tax liability. GeoWealth cannot provide legal or tax advice. GeoWealth suggests that the Client consult with a tax-planning professional about the Client’s personal circumstances. Client understands that investment returns will fluctuate and are subject to market volatility, meaning that shares, when redeemed or sold, may be worth more or less than their original cost. Client should consider whether to utilize tax harvesting based on their particular circumstances and the potential impact tax harvesting may have on their federal income tax liability. GeoWealth cannot provide legal or tax advice. Client should consult with a tax-planning professional about the Client’s personal circumstances, including addressing the complex wash sale rules.

In no event will GeoWealth be obligated to affect any transaction 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 any 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 Print Name Date (MM/DD/YYYY)

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

Signature Print Name Date (MM/DD/YYYY)