

Lifestyle Wealth

New Managed Account Information Page

Client Name _____ Date _____

Account # _____ Advisor Name _____

Account Type ☐ Qualified ☐ Non-Qualified Total Account Value \$ _____

Investment Program

Fund Allocation	☐ Aggressive Growth	☐ Growth
☐ Strategic Allocation	☐ Balanced Growth	☐ Retirement Income
	☐ Balanced Income	☐ Conservative
	☐ High Income	☐ Bond

Individual Equity Management	☐ Legacy GARP	☐ Equity-Income
	☐ Equal Weight AI Leaders	☐ ALL-CAP 30

Total Return Portfolios	☐ Total Return Growth
	☐ Total Return Balanced Growth
	☐ Total Return Balanced Income

Thematic Portfolios	☐ Select Opportunities	☐ New Economy
	☐ Capital Shield Buffer	

Portfolio Constraints

Income requirements _____

Liquidity needs _____

Time Horizon ☐ Less than Three Years ☐ Three to Five Years
☐ Five to Ten Years ☐ More than Ten Years

Legal and Regulatory Concerns _____

Special Situations _____

Tax Considerations _____

Holdings limitations _____

Advisor Signature _____

Date _____