SC Capital Advisors
Strategic, Custom Wealth Solutions

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Core & Factor Portfolio Advisor Proposal/IPS Request Form

Advisor Name/Company: ____

Client Name(s), Ages: ____

Portfolio Summary (Please describe portfolio assets to be managed, i.e. Account(s) registrations, market values, asset allocations):

Do you have account statements? Yes/No

Email address to send upload link for statements: _______________________________________

Is client retired? Yes/No

If no, approximately how long to retirement: ____

Annual Income: ______________________ Is income variable year-to-year: Yes/No

Client Occupation(s):____

Describe client willingness for investment risk (circle one): Below Average/Average/Above Average

Describe Client investment knowledge/experience (circle one): below average/average/above average

Desired Asset Allocation (%): Stocks __________, Bonds _________, Cash ___________

Portfolio liquidity/spending requirements: ______________________ per year/month (circle one)

Please describe and unique client circumstances affecting the management of the portfolio and any portfolio restrictions such as Environment, Social, and Corporate Governance restrictions:

Portfolio management and investment advisor services provided through Belpointe Asset Management LLC. Past performance is no assurance of future results.