

Asset Advisor Mutual Fund Selection and Allocation Addendum

Fund Rebalance Trading System

Choose the frequency in which you want The Introducing Firm to rebalance your Eligible Assets mutual funds listed above. If left blank, The Introducing Firm will default to Annually.

- Annually
 Semi-Annually
 Quarterly
 None

Client Signature X		Client Signature X	
Title or Capacity	Date	Title or Capacity	Date
Financial Advisor Signature	Date	Firm Principal Signature	Date
Accepted by Introducing Firm's Asset Advisor Coordinator			Date