# STRATEGY SELECTION & INFORMATION
**(Churchill Management Group "New Account Form")**

**Account Contact Name** ______________________________________________ **Approx. Account Value $**________________

**Account Title** (i.e.: John Smith IRA):________________________________________________________________

**Percentage Goals** (Must Equal 100%): ________% **Equity** __________% **Fixed Income**

Round Goal to Nearest 0 or 5. **There can be no Fixed Income goal for Maximum Growth Tactical Accounts.**

## EQUITY STRATEGY

**Please select only one.**

| | |
|---|---|
| ◯ PREMIER WEALTH TACTICAL | ◯ EQUITY GROWTH AND VALUE |
| ◯ PREMIER WEALTH TACTICAL CORE<br>◯ TACTICAL OPPORTUNITY<br>PREMIER WEALTH TACTICAL CORE/ETF SECTOR ROTATION (100% S&P 500 Sectors)<br>◯ 70% Premier Wealth Tactical Core / 30% ETF Sector Rotation (100% S&P 500 Sectors)<br>◯ 50% Premier Wealth Tactical Core / 50% ETF Sector Rotation (100% S&P 500 Sectors)<br>◯ 30% Premier Wealth Tactical Core / 70% ETF Sector Rotation (100% S&P 500 Sectors)<br>◯ EQUITY DIVIDEND INCOME<br>◯ EQUITY GROWTH OPPORTUNITY | ETF SECTOR ROTATION ***(Each box below is a separately managed Account. These percentages represent the approximate maximum goals for the equity portion of your Account at time of purchase. When not in sector funds, the Account may be invested in the S&P 500 as represented by the SPDR or an equivalent fund.)***<br>◯ 100% S&P 500 Sectors<br>◯ 75% S&P 500 Sectors / 25% Russell Market Cap & Style Sectors<br>◯ 50% S&P 500 Sectors / 50% Russell Market Cap & Style Sectors<br>◯ 85% S&P 500 Sectors / 15% International Sector<br>◯ 60% S&P 500 Sectors / 25% Russell Market Cap & Style Sectors / 15% International Sector<br>◯ 45% S&P 500 Sectors / 40% Russell Market Cap & Style Sectors / 15% International Sector<br>*In smaller accounts CMG may choose to solely purchase and stay fully invested in ETFs not normally purchased in Sector Rotation that invest in macro market indices despite client's strategy selection until such time as the account grows to a level making managing in the selected strategy appropriate. |

If Client (as defined in the Relationship Agreement) is updating the equity strategy for this pre-existing account or if this is a new account that is being funded from existing Churchill managed account(s) under this same agreement, please note that there may be a period of time in which the account cannot be traded, leaving the account temporarily exposed to market risk. Management will use its sole discretion as to the timing of converting a pre-existing account into another equity strategy. Management may choose to delay the sale of certain investments due to tax or investment reasons while the remaining portion of the account is converted well in advance.

## FIXED INCOME

**Please select type of money market or bonds-even if no bond goal.**

◯ Taxable (i.e. Corporate Bond) ◯ Non-Taxable (i.e. Municipal Bond) **State of Residency:** _______

## RESTRICTIONS & SPECIAL INSTRUCTIONS (OPTIONAL)

Please list any additional information Management should know about Client(s) situation or special instructions. This includes anything that might affect how Management manages Client(s) Account(s) (such as tax situation or cost basis on individual securities). If Client(s) are restricting the sell of an asset, please specify the symbol or cusip, number of shares of the restricted asset and if a dividend reinvestment instruction is to remain. The addition or absence of information in this section amends all previous instructions for this account. (Please read "Investment Guidelines" in your Relationship Agreement.)

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## CLIENT SIGNATURES

**Client(s) have reviewed and agrees with all information Management has prefilled in this New Account Form prior to Client's signature. Client(s) acknowledge that Client(s) hereby becomes a party to and agree to the terms of Churchill Management Group's Relationship Agreement.**

| | | | |
|---|---|---|---|
| ____________________<br>Client Signature | ____________<br>Date | ____________________<br>Client Signature | ____________<br>Date |
| ____________________<br>Client Signature | ____________<br>Date | ____________________<br>Client Signature | ____________<br>Date |

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**For Internal Use Only**

Accepted By: Churchill Management Group ______________________________ ________________

Officer's Signature Date

☐ **This Form is updating Client's existing Account # ___________.** ☐ **Includes Strategy Change?**

**Version 10 020420**