

STRATEGY SELECTION & INFORMATION
(Churchill Management Group at Focus Partners Wealth "New Account Form")

Account Contact Name _____ Approx. Account Value \$ _____

Account Title (i.e.: John Smith IRA): _____

Percentage Goals (Must Equal 100%): _____ % Equity _____ % Fixed Income _____ % Fixed Income Shorter Term
Round Goal to Nearest 0 or 5. If appropriate, you may only choose one fixed income goal.

EQUITY STRATEGY

Please select only one.

<input type="radio"/> PREMIER WEALTH TACTICAL	<input type="radio"/> EQUITY GROWTH AND VALUE
<input type="radio"/> PREMIER WEALTH TACTICAL CORE	<p>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. Sector ETFs, which sectors are defined by the S&P 500, may hold securities not within the S&P 500.)</p> <div style="display: flex; flex-direction: column;"><div><input type="radio"/> 100% S&P 500 Sectors (used in Churchill Risk Blended Strategies)</div><div><input type="radio"/> 75% S&P 500 Sectors / 25% Russell Market Cap & Style Sectors</div><div><input type="radio"/> 50% S&P 500 Sectors / 50% Russell Market Cap & Style Sectors</div><div><input type="radio"/> 85% S&P 500 Sectors / 15% International Sector</div><div><input type="radio"/> 60% S&P 500 Sectors / 25% Russell Market Cap & Style Sectors / 15% International Sector</div><div><input type="radio"/> 45% S&P 500 Sectors / 40% Russell Market Cap & Style Sectors / 15% International Sector</div></div> <p><small>*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.</small></p>
<input type="radio"/> TACTICAL OPPORTUNITY	
<p>RISK BLENDED STRATEGIES</p> <div style="display: flex; flex-direction: column;"><div><input type="radio"/> Churchill Moderate</div><div><input type="radio"/> Churchill Moderately Aggressive</div><div><input type="radio"/> Churchill Aggressive</div></div>	
<input type="radio"/> EQUITY DIVIDEND INCOME	
<input type="radio"/> EQUITY GROWTH OPPORTUNITY	
<input type="radio"/> CONCENTRATED POSITION SOLUTIONS	

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. Client authorizes Management to liquidate all assets at its discretion, regardless of any tax ramifications or otherwise.

FIXED INCOME

Select type of money market or bond preference even if no bond goal. (Note, Management, despite selection, will use discretion as to whether to buy taxable or tax-free fixed income instruments based on the market).

☐ 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 requesting an asset be unsupervised to avoid a tax situation). 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.) _____

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.

Client Signature _____ Date _____ Client Signature _____ Date _____ Client Signature _____ Date _____

Client Signature _____ Date _____ Client Signature _____ Date _____

For Internal Use Only

Accepted By: Churchill Management Group _____ Officer's Signature _____ Date _____

☐ This Form is updating Client's existing Account # _____.

☐ Includes Strategy Change?