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.

- ◯ PREMIER WEALTH TACTICAL
- ◯ PREMIER WEALTH TACTICAL CORE
- ◯ TACTICAL OPPORTUNITY
- RISK BLENDED STRATEGIES
  - ◯ Churchill Moderate
  - ◯ Churchill Moderately Aggressive
  - ◯ Churchill Aggressive
- ◯ EQUITY DIVIDEND INCOME
- ◯ EQUITY GROWTH OPPORTUNITY
- ◯ EQUITY GROWTH AND VALUE

◯ 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.)***

- ◯ 100% S&P 500 Sectors (used in Churchill Risk Blended Strategies)
- ◯ 75% S&P 500 Sectors / 25% Russell Market Cap & Style Sectors
- ◯ 50% S&P 500 Sectors / 50% Russell Market Cap & Style Sectors
- ◯ 85% S&P 500 Sectors / 15% International Sector
- ◯ 60% S&P 500 Sectors / 25% Russell Market Cap & Style Sectors / 15% International Sector
- ◯ 45% S&P 500 Sectors / 40% Russell Market Cap & Style Sectors / 15% International Sector

*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. Client authorizes Management to liquidate all assets at its discretion, regardless of any tax ramification 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.) ______________________________

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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.

Signature	**Date**	**Signature**	**Date**	**Signature**	**Date**
Signature	**Date**	**Signature**	**Date**	**Signature**	**Date**

For Internal Use Only

Accepted By: ______________________________ ____________________
Signature Date

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

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