Plus Portfolios Allocation Change Form

Use this form to indicate a change to an existing Plus Portfolios allocation in a Client's account(s), which is managed under an Investment Management Agreement between the Advisor and the Client noted below. The account number(s) must be included on this form.

Investment Strategy Allocation *(To be completed by Advisor)*			
Note that as a result of the change, trades executed may result in a taxable event in the Client's Account(s).			
Account Number/Account Title/Registration		**Existing Model**	**New Model**
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
Any model change outside of the client's current investment objective and/or risk tolerance requires completion of an updated Customer Account Form.			

Rationale:

Authorized by Advisor

The Advisor hereby represents that the Client Profile information provided to the Advisor is current, accurate and complete:

SIG: ______________________ NAME: ______________________ DATE: ______________