



Account Application

Name(s) _____

Mailing Address _____

Home Phone _____ Work Phone _____

Cell Phone _____ Email _____

Referred by _____

InTrust Advisors (InTrust) provides portfolio management and consultation in accordance with your investment objectives and financial goals. Your answers to the following questions and inputs help to shape our understanding of your goals and objectives. However, we recognize that these questions may only provide an initial view of your goals and objectives. Therefore, please provide as much information as you can regarding your investment philosophies, preferences, risk concerns, and any other information that might be helpful in managing your assets. (Use additional pages as necessary.)

I am interested in the following investment choices:

Market Adaptive Portfolio Strategies (MAPS) (choose one or more below):

MAPS MODEL PORTFOLIOS	
<u>Objective/Risk Level</u>	<u>ETF Program</u>
Conservative Growth	<input type="checkbox"/> IA Balanced 60-40
Moderate Growth	<input type="checkbox"/> IA Balanced 80-20 <input type="checkbox"/> IA Tactical Equity <input type="checkbox"/> IA Global Equity
Aggressive Growth	<input type="checkbox"/> IA All Market

The MAPS strategies use a combination of trend following (applied to the core/style allocations) and traditional technical analysis with a momentum overlay on all other allocations. Each position that does not have a corresponding hedge has a stop loss applied and strict position sizing is applied to all ETFs purchased. This portfolio can and will hold inverse and leveraged ETFs.

A Personalized Portfolio Solution (PPS). Please prepare me a customized ETF portfolio with the goal of being in the market when it is going up and out, in cash, treasuries or gold when it is not. *If you would like us to consider modifying an existing portfolio, please also attach a recent statement on that portfolio(s).*

The Active Hedge Overlay (Active Hedge). Please prepare me a customized ETF overlay that is traded long and short based on our trend following models for my existing portfolio that will help me protect it in down markets and profit from rising markets. *Please provide us with a copy of a recent statement on the portfolio or portfolios you would like to overlay.*

NOTE: Our minimum account size for each strategy (MAPS, Active Hedge or PPS) is \$100,000. Each strategy/model requires its own separate account and must meet its own minimum account size limitation.

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Investment Objectives and Risk Profile:

The following series of very basic questions attempts to provide an initial profile of your investment objectives and risk tolerance. Please feel free to add comments on additional pages where necessary to clarify your responses.

Rank the following investment objectives from 1 to 4 (1 being most important and 4 being least important):

- Preservation of Capital
- Income
- Moderate Growth — returns equivalent to the broader market
- Aggressive Growth — returns above the broader market

You are willing to take the following amount of risk in pursuit of your investment objectives:

- I am comfortable with the risk inherent in stock market investing.
- I can tolerate a 5-10% monthly loss in pursuit of above-market gains.
- I do NOT want the account balance to fall below its initial value.

What percentage of your Net Worth are we managing?

The investment capital being considered to invest with InTrust represents roughly the following percent (%) of my total net worth:

- 75- 100% 50-75% 25-50% less than 25%

This portfolio or these portfolios should have the goal of producing an annual rate of return of?

Rate of Return: _____%

Other items to consider including asset classes you do not want to hold, time horizons, expected additions or withdrawals from this portfolio, etc.?

Please return completed application to:

InTrust Advisors
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