

Investment Policy Statement

1. What is your investment goals and objectives?

2. What is the time horizon of your goals and objectives?

3. Do you have any investment preferences or restraints?

4. What are your risk/reward parameters?

5. Recommended asset allocation:

6. Performance benchmarks:

| | | | |
|--------|------|-----------------|------|
| Client | Date | Account Manager | Date |
|--------|------|-----------------|------|
