

WRAP FEE PROGRAM

Discretionary Investment Advisory Agreement

Between Sunstate Wealth Management, LLC and the Client identified below

PARTIES TO THIS AGREEMENT

ADVISOR

Sunstate Wealth Management, LLC

A limited liability company duly registered as an investment adviser with the U.S. Securities and Exchange Commission under the Investment Advisers Act of 1940.

CLIENT

The undersigned client(s) identified on the signature page of this Agreement.

EFFECTIVE DATE

(the "Effective Date")

This Agreement governs the discretionary investment advisory services provided by Sunstate Wealth Management, LLC to the Client through the Advisor's Wrap Fee Program. By signing this Agreement, the Client retains the Advisor to manage certain assets identified as the "Portfolio" for a single bundled fee covering investment advisory services, sub-advisory services, and certain execution services, as more fully described in the Advisor's Wrap Fee Program Brochure (Form ADV Part 2A Appendix 1).

SECTION — | RECITALS

THIS DISCRETIONARY ADVISORY AGREEMENT (this “**Agreement**”) is entered into as of the Effective Date by and between the undersigned (the “**Client**”) and **Sunstate Wealth Management, LLC**, a Florida limited liability company duly registered as an investment adviser with the U.S. Securities and Exchange Commission under the Investment Advisers Act of 1940, as amended (the “**Advisers Act**”), (the “**Advisor**”).

The Client hereby retains the Advisor, and the Advisor hereby agrees to provide discretionary investment management services with respect to certain assets of the Client (the “**Portfolio**”) through a wrap fee program sponsored by the Advisor (the “**Wrap Fee Program**”), pursuant to which the Client pays a single bundled fee covering investment advisory services, sub-advisory services, and certain execution services, as more fully described in the Advisor’s Wrap Fee Program Brochure (Form ADV Part 2A Appendix 1), under the following terms and conditions:

SECTION 1 | APPOINTMENT AS THE INVESTMENT ADVISOR

In its role as discretionary Advisor, the Advisor will provide advice and recommendations, supervise, manage and direct the assets, including cash, in the Portfolio, and will purchase, sell, invest, reinvest, exchange, convert, and trade the assets in the Portfolio and place all orders for the purchase and sale of securities without the Client’s prior consent.

The Client acknowledges and agrees that the Advisor may recommend and appoint one or more unaffiliated third-party investment advisers, sub-advisers, or sub-brokers (each, a “**Sub-Advisor**”), including but not limited to Xendia Wealth LLC (formerly BCP Advisors LLC), to manage all or a portion of the Portfolio.

To the extent a Sub-Advisor is engaged, the Client hereby authorizes such Sub-Advisor to exercise discretionary authority over the assets allocated to it, including the authority to purchase, sell, invest, reinvest, exchange, convert, and trade securities without prior Client approval, subject to the terms of the Sub-Advisor’s separate investment advisory agreement entered into directly between the Client and the Sub-Advisor.

The Advisor shall retain overall supervisory responsibility, including due diligence, selection, and ongoing monitoring of any Sub-Advisor; however, the Advisor shall not be responsible for the day-to-day investment decisions made by such Sub-Advisor.

The Advisor represents that, as of the Effective Date, Xendia Wealth LLC (formerly BCP Advisors LLC) is duly registered as an investment adviser under the Advisers Act or with the applicable state securities regulator and is not affiliated with the Advisor. The Sub-Advisor’s compensation for sub-advisory services rendered to the Client is paid out of the bundled Advisory Fee charged to the Client under this Agreement, and the Client will not be charged any separate sub-advisory fee. Concurrently with the execution of this Agreement, the Client acknowledges receipt of the Sub-Advisor’s Form ADV Part 2A (and applicable Part 2B brochure supplement) describing the Sub-Advisor’s business, conflicts of interest, and disciplinary history.

SECTION 2 | INVESTMENT OBJECTIVES

The Advisor’s advice and management with respect to the allocation and management of the Portfolio will be based on information provided by the Client about the Client’s investment objectives, risk tolerance and financial circumstances. The Client agrees to promptly notify the Advisor in writing of any changes in the information provided by the Client to the Advisor under this Section 2.

The Client acknowledges that, for any portion of the Portfolio managed by a Sub-Advisor, investment decisions will be made on a discretionary basis by such Sub-Advisor in accordance with the applicable investment mandate.

SECTION 3 | CUSTODIAN SELECTION; CUSTODY OF ASSETS; DIRECTED BROKERAGE

(a) By completing the **Custodian Selection** section in **Exhibit A** to this Agreement, the Client hereby confirms that it has selected the entity identified in Exhibit A to serve as the custodian that will hold the assets in the Portfolio (the “**Custodian**”).

(b) The Client authorizes the Advisor and, where applicable, any Sub-Advisor, to issue instructions to the Custodian as may be appropriate in connection with the settlement of transactions initiated pursuant to the terms hereof. The Client hereby warrants and represents that the Custodian has agreed and will continue throughout the term of this Agreement to accept responsibility for the prompt delivery of cash or securities to settle security transactions effected on behalf of the Client.

The Advisor shall at no time receive, retain or physically control any cash, securities or other assets in the Portfolio; provided, however, that the Advisor will assist the Client to obtain disbursements from the Portfolio from the Custodian from time to time as the Client requests.

(c) Absent contrary written instruction from the Client, the Client hereby instructs the Advisor and any Sub-Advisor to direct all Portfolio transactions to the Custodian.

SECTION 4 | FEES AND EXPENSES

(a) As sponsor of the Wrap Fee Program, the Advisor's annual advisory fee (the "**Advisory Fee**") is a single bundled wrap fee that covers investment advisory services provided by the Advisor, sub-advisory services provided by any Sub-Advisor engaged by the Advisor, and ordinary execution costs associated with transactions effected through the Custodian. The Advisory Fee does not cover the third-party charges identified in Section 6 of **Exhibit B**, which remain the Client's sole responsibility. The Advisory Fee will be determined by reference to a percentage of the market value of the Portfolio in accordance with the fee schedule attached to this Agreement as **Exhibit B**. The Advisory Fee shall accrue commencing on the Effective Date and shall be calculated and due and payable **monthly in arrears** in accordance with the calculation methodology set forth in Exhibit B. The Client shall be, and if there shall be more than one Client, all the Clients shall be jointly and severally, liable for payment of all fees and charges payable hereunder, including but not limited to the Advisory Fee. The Client expressly authorizes the Advisor to instruct the Custodian to deduct the Advisory Fee directly from the Portfolio in accordance with Rule 206(4)-2 under the Advisers Act. The Client acknowledges that (i) the Custodian will send account statements directly to the Client at least quarterly identifying the amount of any Advisory Fee deducted from the Portfolio, and (ii) the Client should carefully review such statements and compare the fee amounts to the calculation methodology set forth in Exhibit B.

(b) Any increase in the Advisory Fee shall require the Client's written consent; non-fee, non-material amendments to Exhibit B may be made by the Advisor upon thirty (30) days' prior written notice to the Client, and the Client's continued maintenance of the Portfolio after the effective date of such amendment shall constitute consent to such non-material changes.

Billing in Arrears.

The Advisory Fee is billed **monthly in arrears**—that is, *after* services have been provided for the applicable billing period. The Advisor does not collect the Advisory Fee in advance of services rendered.

SECTION 5 | REPORTS

The Client will direct the Custodian to send or otherwise make available to the Advisor, either in paper, electronically or through electronic access, copies of (a) confirmations of transactions occurring in the Portfolio; and (b) statements showing the Portfolio's receipts and disbursements, trades, securities and value for monthly or other applicable periods. The Client will notify the Advisor in writing if the Client does not receive at least quarterly statements from the Custodian. In addition, the Advisor may, but is not required to, provide additional reports to the Client.

SECTION 6 | TERM AND TERMINATION

The term of this Agreement shall begin on the Effective Date and continue until either Advisor or Client terminates this Agreement. Notwithstanding the foregoing, the Client may terminate this Agreement without penalty within five (5) business days after execution by providing written notice of termination to the Advisor. After such initial period, either the Client or the Advisor may terminate this Agreement by giving thirty (30) days' prior written notice of termination to the other party. Upon termination, any fees earned but unpaid as of the effective date of termination, calculated on a pro rata basis through that date, shall be promptly paid by the Client to the Advisor. Because the Advisory Fee is billed in arrears, the Client is not entitled to a refund of any prepaid Advisory Fee, and the Advisor is not entitled to any portion of the Advisory Fee that accrues after the effective date of termination.

SECTION 7 | LIMIT OF LIABILITY

(a) The Client agrees that all transactions in the Portfolio are for the Client's sole account and risk.

(b) Subject in all cases to the Advisor's fiduciary duties under the Advisers Act and applicable federal and state securities laws (which the Client may not waive and which are expressly preserved by Section 7(d) below), the Client agrees that the Advisor shall not be liable for any loss suffered by the Client arising out of any recommendation, transaction, investment, or other action taken in good faith with respect to the Portfolio pursuant to this Agreement; provided, however, that the Advisor shall not be excluded from liability for losses occasioned by the Advisor's negligence, willful misfeasance, bad faith, breach of fiduciary duty, or violation of applicable law in the performance of its duties hereunder. The Advisor shall have no responsibility whatsoever for the allocation or management of any assets of the Client other than the Portfolio.

The Client acknowledges and agrees that the Advisor shall not be liable for losses arising from the acts or omissions of any Sub-Advisor, including investment decisions, trading activity, or execution practices, except to the extent such losses result from the Advisor's failure to satisfy its obligations with respect to the selection, oversight, or monitoring of such Sub-Advisor under applicable law. Nothing herein shall waive or limit any rights the Client may have under applicable federal or state securities laws.

(c) The Client and the Advisor acknowledge that the initial Portfolio may have been inherited by the Advisor from the Client or the Client's prior investment advisor, if any (a "Predecessor Advisor"). The Client releases and holds the Advisor harmless from any and all losses or damages of the Portfolio resulting from the actions of the Client or any Predecessor Advisor not specifically involving the Advisor's recommendations regarding the Portfolio.

(d) Federal and state securities laws impose liabilities under certain circumstances on persons who act in good faith, and nothing in this Agreement shall constitute a waiver or limitation of any rights which the Client may have under applicable federal or state law.

SECTION 8 | CLIENT'S ACKNOWLEDGMENTS, UNDERSTANDINGS, AND REPRESENTATIONS

- (a) The Client acknowledges receipt and review of: (i) the Advisor's Privacy Policy Notice (delivered in compliance with Regulation S-P); (ii) the Advisor's Wrap Fee Program Brochure (Form ADV Part 2A Appendix 1); (iii) the Advisor's narrative brochure under Form ADV Part 2A, the applicable brochure supplement under Form ADV Part 2B, and the Form CRS Customer Relationship Summary required under Rule 204-5 of the Advisers Act; and (iv) the Sub-Advisor's Form ADV Part 2A, in each case before execution of this Agreement.
- (b) The Client acknowledges that the Advisor does not have authority or responsibility to vote proxies solicited by or with respect to issuers of securities held in the Portfolio, and does not provide advice with respect to legal proceedings, including bankruptcies and class actions, involving issuers whose securities are held in the Portfolio. The Client will receive proxy materials and other shareholder communications directly from the Custodian and will retain sole responsibility for proxy voting and any related actions; provided, however, that to the extent any Sub-Advisor has been delegated proxy voting authority under its separate agreement with the Client, the Sub-Advisor's proxy voting policy shall govern with respect to the assets managed by such Sub-Advisor, and the Client shall direct the Custodian accordingly.
- (c) The Client specifically acknowledges and agrees: (1) that the Advisor is not warranting that the assets will increase or retain value; and (2) the Client is responsible for tax consequences.
- (d) The Client acknowledges and agrees that the Advisor performs services for other clients and may take differing actions.
- (e) The Advisor may take similar positions for other clients or its own accounts.
- (f) The Advisor may recommend securities where conflicts exist as disclosed in the Advisor's Form ADV Part 2A and Wrap Fee Program Brochure.
- (g) Information used may not be independently verified.
- (h) The Portfolio may bear investment company expenses (such as expense ratios of mutual funds and exchange-traded funds), which are paid by the issuers of those securities and indirectly borne by the Client.
- (i) The Client is responsible for commissions and custody charges.
- (j) Cash positions still incur fees.
- (k) The Client acknowledges and agrees that certain assets in the Portfolio may be managed on a discretionary basis by a Sub-Advisor.

SECTION 9 | ERISA ACCOUNTS

If the Portfolio is subject to the provisions of the Employee Retirement Income Security Act of 1974, as amended ("ERISA"), then:

- The Client agrees to maintain appropriate ERISA bonding for the Portfolio and to include within the coverage of the bond the Advisor and its personnel to the extent required by law;
- The Client represents that engagement of the Advisor, and any instructions that have been given to the Advisor with respect to the Portfolio, are consistent with applicable governing trust and other documents of the plan;
- The Client agrees to furnish the Advisor with copies of such governing trust and other documents upon request; and
- The person signing this Agreement on behalf of the Client represents and warrants that such person is either: (i) the Client (if an individual); or (ii) a named "fiduciary" for the Client, as such term is defined under ERISA.

The Advisor acknowledges that, to the extent the Portfolio is subject to ERISA, the Advisor is a "fiduciary" within the meaning of Section 3(21)(A) of ERISA and Section 4975(e)(3) of the Internal Revenue Code with respect to the assets in the Portfolio over which the Advisor exercises discretionary investment authority, and the Advisor will discharge its duties with the care, skill, prudence, and diligence required by ERISA Section 404(a).

If the Portfolio contains only a part of the assets of an ERISA plan, the Client understands and agrees that the Advisor will have no responsibility for the allocation or management of any assets of the plan except for the assets in the Portfolio.

SECTION 10 | COMMUNICATIONS AND ELECTRONIC DELIVERY

- (a) Any notice, correspondence, or other communication required in connection with this Agreement will be deemed effective upon receipt if delivered to either party at their last known address. In the case of the Client, any notice, correspondence, or other communication required in connection with this Agreement will also be deemed effective when provided orally by the Advisor to the Client, sent to an e-mail address specified by the Client from time to time (the "Email Address") or upon a posting by the Advisor on a web site of the Advisor to which the Client has password access (the "Web Site").
- (b) If this Agreement has more than one signatory, then the Client understands and agrees that the Advisor may provide, receive and accept communications to and from any such signatory, and that in such a case the Advisor has no duty or obligation to verify such communications with any other signatory to the Agreement.

(c) Notwithstanding any other provisions of this Agreement, the Client hereby acknowledges and agrees that consistent with Section 10(a) above, the Advisor may deliver communications and documents by electronic means rather than orally or by traditional mailing of paper copies. By consenting to the electronic delivery of all information relating to the Portfolio, the Client acknowledges possessing the technical ability and resources to receive electronic delivery of documents through the Email Address or a Web Site and authorizes the Advisor to deliver all communications by e-mail to the Email Address, or by posting the communication on the Web Site. The Client further agrees that the Advisor may provide in any electronic medium (including via Email Address delivery or posting on a Web Site) any recommendation, disclosure or document that is required by applicable securities laws or this Agreement to be provided by the Advisor, and that use of any one method permitted under this Agreement for communications with the Client shall be sufficient to satisfy any delivery requirement hereunder. The consent granted herein will last until the Advisor receives notice of the Client's revocation and has had a reasonable period of time to act thereon. In the event that no Email Address is provided to the Advisor by the Client, then the Client agrees that the Advisor may deliver communications and documents orally or by traditional mailing of paper copies. The Client further acknowledges and consents, in accordance with the Electronic Signatures in Global and National Commerce Act (15 U.S.C. § 7001 et seq.) and applicable state law, to: (i) the use of electronic records and electronic signatures in connection with this Agreement and any related disclosures, agreements, notices, statements, and consents (collectively, "Electronic Communications"); (ii) the electronic delivery of all Electronic Communications, including those required to be delivered in writing under the Advisers Act and other applicable laws; and (iii) the use of an electronic platform to execute this Agreement. The Client represents that the Client has the hardware and software necessary to access, review, retain, and print Electronic Communications, and the Client may withdraw this consent at any time by providing written notice to the Advisor (with such withdrawal effective only after the Advisor has had a reasonable opportunity to act thereon).

(d) The Client hereby acknowledges that voicemail, email, fax, and other similar means of communication may not come to the Advisor's attention in a timely manner. Accordingly, the Client hereby acknowledges and agrees that if the Client uses such means of communication to make account requests or provide the Advisor with account instructions, such requests or instructions shall not bind the Advisor unless or until the Advisor confirms such requests or instructions; therefore, the Client should direct time-sensitive account requests or instructions to the Advisor only in person or by direct phone call, and the Client's failure to do so may result in delayed implementation of the Client's requests or instructions.

SECTION 11 | GENERAL PROVISIONS

Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Florida, without regard to any principle of conflict of laws that would result in the application of the laws of any other jurisdiction. The Advisor and the Client agree that any appropriate state or any Federal Court located in Miami-Dade County, Florida shall have exclusive jurisdiction of any case or controversy arising under or in connection with this Agreement and shall be a proper forum in which to adjudicate such case or controversy. The parties hereto consent to the jurisdiction of such courts.

Waiver of Jury Trial. THE PARTIES HEREBY WAIVE THE RIGHT TO A JURY TRIAL IN ANY SUCH ACTION, AND CLIENT UNDERSTANDS THAT SUCH WAIVER IS A CONDITION TO ADVISOR'S ACCEPTANCE OF THIS AGREEMENT.

Severability. Each section of this Agreement and any and every provision therein shall be severable from every other section of this Agreement, and any and every provision thereof, and the invalidity or unenforceability of any section or provision shall not affect the validity of any other section or provision of this Agreement.

Assignment. No assignment (as that term is defined in the Investment Advisers Act of 1940, as amended) of this Agreement shall be made by the Advisor without the consent of the Client.

Entire Agreement. This Agreement embodies the entire agreement of the parties hereto with respect to the subject matter hereof, and all prior agreements, understandings, and negotiations are merged herein and superseded hereby.

Amendments. Except for the Fee Schedule set forth on **Exhibit B** to this Agreement, which may be amended by the Advisor on 30 days' prior notice to the Client, this Agreement may not be amended unless the amendment is in writing and signed by the parties sought to be bound.

Client Due Authorization. The Client represents and warrants that the Client is authorized and empowered to enter into this Agreement. If this Agreement is being signed on behalf of a corporation, partnership, trust or other business or legal entity, the Client further represents and warrants that applicable law and the Client's governing documents authorize and permit this Agreement.

Affiliate Relationships and Referral Fees. The Advisor utilizes its affiliates and certain third-party service providers to facilitate our provision of services to Client. As further detailed in the Advisor's privacy policy, the Advisor may share information about the Client and the Portfolio with its affiliates in order to provide services under this Agreement. If the Client was introduced to the Advisor through a promoter, the Advisor may pay that promoter a referral fee in accordance with Rule 206(4)-1 of the Advisers Act and applicable state securities laws. If the Client was introduced to the Advisor through a promoter, the Client acknowledges receipt of the written disclosure, disclosing the terms of the solicitation arrangement between the Advisor and the promoter, including the compensation to be received by the promoter from the Advisor.

Information Sharing. If the Client wishes to grant permission to the Advisor to share information with and/or receive instructions from another person regarding the Portfolio, please complete **Exhibit C**.

EXECUTION
SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the Effective Date.

CLIENT

CLIENT NAME (PRINT)

CLIENT SIGNATURE

DATE

ADVISOR — SUNSTATE WEALTH MANAGEMENT, LLC

OFFICER NAME (PRINT)

OFFICER SIGNATURE

DATE

EXHIBIT A
CUSTODIAN SELECTION

By marking one or more of the following boxes, I (we) hereby confirm that I (we) have selected one or more of the following entities to serve as the Custodian(s) that will hold the assets in the Portfolio:

- Interactive Brokers LLC (“IB”)
- Other (provide name of Custodian): _____

The Client acknowledges and agrees that, where applicable, a Sub-Adviser (including but not limited to Xendia Wealth LLC (formerly BCP Advisors LLC)) may have discretionary trading authority over assets held at the selected Custodian(s), and may execute transactions through such Custodian(s) or affiliated broker-dealers pursuant to the Sub-Adviser’s separate investment advisory agreement with the Client.

CUSTODIAN CONTACT INFORMATION

CLIENT ACKNOWLEDGMENT

CLIENT NAME (PRINT)

CLIENT SIGNATURE

DATE

EXHIBIT B
FEE SCHEDULE

In connection with its advisory services, the Advisor shall receive fees consisting of (i) an annualized fee on each account based on the assets under management (“AUM”) in the Portfolio and (ii) other fees as specified in this Fee Schedule (together, the “Advisory Fee”).

1. AUM Fees

The AUM fee shall be calculated based on the following tiered schedule:

PORTFOLIO VALUE	ANNUALIZED AUM FEE
Up to USD 100,000	1.75% per year
From USD 100,001 to 500,000	1.50% per year
From USD 500,001 to 1,000,000	1.25% per year
Above USD 1,000,000	1.00% per year

The Advisory Fee shall be billed at a blended rate. The advisory fee is automatically calculated by Interactive Brokers. The calculation is made daily based on the ending market value (“EMV”) of the assets managed by the Advisor the previous month. To make the daily calculation, Interactive Brokers applies the annual tiered rate to the EMV and then divides it by 252 business days for the year. The fee charged is the sum of the daily fee calculations at the end of the month.

The Client acknowledges that, where a Sub-Adviser is engaged, the Advisor’s Advisory Fee may include amounts payable to such Sub-Adviser for discretionary portfolio management services.

2. Other Fees Paid to Advisor

Other fees (such as fixed monthly fees) — Please insert description:

3. Portfolio Valuation

For purposes of this Exhibit B, the value of the Portfolio shall be the sum of the fair market value of all of the assets, including cash and accrued interest, in the Portfolio. Equity securities listed or traded on a national securities exchange or quoted on the over-the-counter market are valued at the last sales price on the day of valuation or, if no sale price is reported, at the last bid price. Other assets and securities for which market quotations are not readily available are valued at fair market value as determined in good faith by the Advisor.

4. Fee Deduction Authorization

The Advisor is authorized to invoice the Custodian directly and deduct from the Portfolio its Advisory Fee. The Client agrees to instruct the Custodian to pay such fee directly to the Advisor. In accordance with Rule 206(4)-2 under the Advisers Act: (i) the Client expressly authorizes the deduction of the Advisory Fee from the Portfolio by the Custodian; (ii) the Custodian, as a “qualified custodian” within the meaning of such rule, will send account statements directly to the Client at least quarterly identifying the assets in the Portfolio and the amount of any Advisory Fee deducted from the Portfolio during the period; and (iii) the Advisor will maintain a reasonable basis to believe such statements are sent to the Client. The Client is encouraged to compare such statements to any reports provided by the Advisor.

Where applicable, the Client further authorizes the Custodian to facilitate fee payments associated with Sub-Adviser-managed accounts in accordance with the Sub-Adviser’s separate advisory agreement with the Client and the Custodian’s standard operating procedures.

5. Amendments to Fee Schedule

Any increase in the Advisory Fee set forth in this Exhibit B shall require the Client's written consent. Non-fee, non-material amendments to this Exhibit B may be made by the Advisor on thirty (30) days' prior written notice to the Client, and the Client's continued maintenance of the Portfolio after the effective date of such amendment shall constitute consent to such non-material changes.

6. Expenses Not Covered by the Advisory Fee

The Client acknowledges that the Advisory Fee due to the Advisor shall cover the Advisor's services under this Agreement, including oversight and monitoring of any Sub-Advisor. The Client acknowledges that the following expenses, each of which is the Client's sole responsibility, are not covered by the Advisory Fee due to the Advisor:

- (a) Brokerage commissions and other transaction charges for trades effected away from the Custodian, mark-ups and mark-downs on principal transactions, exchange fees, regulatory fees (including SEC Section 31 fees and FINRA TAF), wire transfer fees, ADR fees, and other transaction-related charges that are not customarily included in a wrap fee program (it being understood that ordinary commissions and execution costs for transactions effected through the Custodian as part of the Wrap Fee Program are included in the Advisory Fee);
- (b) Custody charges for custody of assets in the Portfolio; and
- (c) Any advisory and other fees and expenses described in the investment company prospectuses for investment company securities in the Portfolio that are paid by such investment companies but are ultimately borne by the investor.

CLIENT ACKNOWLEDGMENT OF FEE SCHEDULE

CLIENT NAME (PRINT)

CLIENT SIGNATURE

DATE

EXHIBIT C
THIRD PARTY APPOINTMENT

Client shall complete this Exhibit C if Client wants to grant permission to Sunstate Wealth Management, LLC (the "Advisor") to share information with and/or to receive instructions from another person regarding the Portfolio. These instructions will remain in place until such time that Client provides the Advisor with written notice of change and the Advisor has had a reasonable opportunity to act on the revised information. Regarding the Portfolio, Client hereby authorizes the Advisor to:

AUTHORIZATION 1

Release Information To Accept Investment Instructions From*

NAME

ADDRESS

CITY, STATE, ZIP

AUTHORIZATION 2

Release Information To Accept Investment Instructions From*

NAME

ADDRESS

CITY, STATE, ZIP

** Please provide a corporate resolution granting authority to direct investments, or a power of attorney.*

CLIENT AUTHORIZATION

CLIENT NAME (PRINT)

CLIENT SIGNATURE

DATE