Eastern Point Trust Company®

Initial Investment Direction

Use the "Investment Substitution Request Form" to Change Existing Investments

Please return by email to trades@easternpointservices.com. Call **(855) 222-7513** to verify receipt of this form.
Note: **Request will not be processed unless all information is complete.**
Mailing Address: P.O. Box 232 Warrenton, VA 20188

SECTION A: INVESTMENT INFORMATION

Applying to the Trust (Name) _____

Trust ID# _____

SECTION B1: SELECT EITHER A MODEL PORTFOLIO IN SECTION B1, OR CREATE A CUSTOM PORTFOLIO IN B2

Predesigned Model Portfolios (Allocates 100% of Portfolio)

Very Conservative ○ Conservative ○ Prudent Growth ○

Moderate Growth ○ Growth ○ Aggressive ○ Very Aggressive ○

— OR —

SECTION B2: **(Please use whole numbers and must total to 100%)** (DO NOT USE IF SECTION B1 IS SELECTED)

FUND NAME	TICKER SYMBOL	PERCENT
		%
		%
		%
		%
		%
		%
		%
	TOTAL	% 0.00

SECTION C: DISCLAIMER

I request the Trustee execute the instructions as set forth above and I understand that:
The value of investments may fluctuate over time and that risks are associated with investing.
This request shall be executed as administratively feasible and trades may be delayed subject to funds becoming collected.
I waive all rights and claims to any investment returns except for those as actually achieved by and when the funds were invested.
The assets of the Trust belong to the Trust and are subject to the terms of the above named Trust.

SECTION D: AUTHORIZATION

Family Contact Printed Name: _____

Family Contact Signature: _____ Date: _____ MM / DD / YYYY

Choose a Signature Option

CLEAR FORM PRINT FORM SUBMIT FORM

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