



## ALLOCATION CHANGE REQUEST

Contract # \_\_\_\_\_

Owners Name: \_\_\_\_\_

To Chariot Advisors:

Please use this letter as my authorization to change the investment strategy in the contract mentioned above. I would like to change the strategy to the following:

| RISK TOLERANCE      | ABSOLUTE RETURN STRATEGIES   | DIVERSIFIED ASSET ALLOCATION STRATEGIES |
|---------------------|--|---|
| <b>CONSERVATIVE</b> | <input type="checkbox"/> CENTURION (Blend Plus)<br><input type="checkbox"/> APOLLO (Blend Advanced)<br><input type="checkbox"/> ZENITH (Blend Elite) | <input type="checkbox"/> TAURUS         |
| <b>GROWTH</b>       | <input type="checkbox"/> CENTURION (Blend Plus)<br><input type="checkbox"/> APOLLO (Blend Advanced)<br><input type="checkbox"/> ZENITH (Blend Elite) | <input type="checkbox"/> TAURUS         |
| <b>AGGRESSIVE</b>   | <input type="checkbox"/> CENTURION (Blend Plus)<br><input type="checkbox"/> APOLLO (Blend Advanced)<br><input type="checkbox"/> ZENITH (Blend Elite) | <input type="checkbox"/> TAURUS         |

**Note:** Portfolio and/or certain funds may be subject to a 5-day or 15-day hold per Prospectus. Until then, your Portfolio may be moved into the Portfolio Family (e.g. Apollo) that you have selected, if feasible, in a lower risk level.

*\*If you want to invest in more than one of the above strategies, please contact us directly at (919) 380-9555 or (877) 225-1325.*

*\*\* Additional information on your selected strategy referenced above can be found in your completed Risk Tolerance Questionnaire and Investment Advisory Agreement & Strategy Selection Form. For further information on each strategy please consult with your Financial Advisor.*

*If applicable: I am choosing to deviate from the portfolio series risk level suggested by the score listed on my Risk Tolerance Questionnaire until further written notice. \_\_\_\_\_ (client initials)*

Please make this change effective as soon as possible.

Owner's Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_

Owner Signature: \_\_\_\_\_

→PLEASE FAX THIS FORM TO: (919) 573-9344←