CHARIOT
Advisors, LLC

INSTRUCTIONS

Please read carefully

IMPLEMENTING THE CHARIOT WRAP ACCOUNT THROUGH TRUST COMPANY OF AMERICA

1. Have your client complete and sign the Chariot Risk Tolerance Questionnaire. This can be used to help you guide your client towards a suitable portfolio selection.

2. Complete the Chariot Investment Advisory Agreement and Strategy selection form. This serves as the Client/Advisor Agreement and Investment Strategy Selection notification. It contains important terms and conditions that you and the client should review. Please complete the form legibly and completely, making sure the client receives a copy of it. Be sure to complete all sections, including your selected asset management fee. Be sure your client signs the last page and clearly indicates his/her Investment Strategy selection.

3. Log on to Trust Company of America's (TCA) website to access new account forms as well as maintenance forms. You should have received an email from TCA with login instructions. Complete all TCA required information (all forms can be easily completed online through Fillable Forms), print off your forms, obtain client signatures.

4. Send the Chariot Advisory Agreement and Strategy Selection form, Chariot Risk Tolerance Questionnaire, and all TCA forms to us:

Mail:	**Fax:**	**Email:**
Chariot Advisors, LLC 1405 Hillsborough Rd. Raleigh, NC 27605	(919) 573-9344	info@chariotadvisorsllc.com

5. IMPORTANT – Please send all funds directly to Trust Company of America. Checks are made payable to Trust Company of America. Wires will also be sent directly to Trust Company of America.

6. Please be sure your client receives a copy of the Chariot Advisors Form ADV. Please do not send the Form ADV to Chariot Advisors. Questions: (877) 225-1325 info@chariotadvisorsllc.com