



FUND OPTIONS

Please use this menu to let us know how you want to implement your index portfolio. If you need help with this form, please contact your IFA Wealth Advisor. Please send this back to your advisor when completed.

YOUR NAME

CONTACT EMAIL / PHONE NUMBER

DATE

YOUR ADVISOR

To determine your Stock/Bond allocation, visit www.ifa.com/survey and take our Risk Capacity Survey.

%
STOCKS
 IFA DEFAULT

FUND MANAGER

Dimensional Avantis Vanguard Multi-Manager

FACTOR TILTS

Small Cap/Value/Profitability Mid Cap/Value/Profitability

Large Cap/Value/Profitability Large Cap Growth

Factor Neutral Profitability Core Funds Custom

SCREENED OPTIONS Socially Responsible Sustainable

%
BONDS
 IFA DEFAULT

FUND MANAGER

Dimensional Avantis Vanguard Multi-Manager

ISSUER

Government / Corporate Tax-Advantaged Munis

California New York National

RISK/RETURN EXTENSIONS Maturities Credit Both