



Custom Index Strategy Addendum

New Update

Primary Client: First Name / MI / Last Name

_____ / _____ / _____

Account Number

Account Type

Additional Client: First Name / MI / Last Name

_____ / _____ / _____

Custodian

Rep Code

Strategy Name	Dollar Amount	Tax Rates	Budget Type
		Short Term Default (40.8%) Custom _____ AND Long Term Default (23.8%) Custom _____	Annual Ongoing _____ OR Variable By Year 2026 Budget _____ 2027 Budget _____ 2028 Budget _____ 2029 Budget _____ 2030+ Budget _____ OR No Cap/Unlimited

The budget will be set for this sleeve. For \$0 budget, gain/loss can vary anywhere from \$0 up to \$1,000 of realized gains.

Special Instructions/Restrictions:

Capita Default for Tax Managed Services: Use Tax-Loss Harvesting Targets of -\$100 and 3%.

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Advisor Representative Signature

Advisor Representative Name

Date

