MODEL CHANGE REQUEST FORM
Trust Company of America Accounts

GREEN INVESTMENT MANAGEMENT, INC.
309 W. 7th St. Ste 100, Fort Worth, TX 76102

Account Title: _____ **Account Number:** _____

	Previous Model Percentage	New Model Percentage	Model Name
GIM	_____	_____	GIM Guardian Fixed Income
	_____	_____	GIM Guardian Balanced Income 30/70
	_____	_____	GIM Guardian Conservative Balanced 50/50
	_____	_____	GIM Guardian Balanced 60/40
	_____	_____	GIM Guardian Balanced Growth 75/25
	_____	_____	GIM Guardian Balanced Mosaic
	_____	_____	GIM Guardian Global Stock
	_____	_____	GIM Equity Mosaic
	_____	_____	GIM Guardian Sector
	_____	_____	GIM Guardian Alternatives
	_____	_____	GIM Guardian Country
	_____	_____	GIM Tax Aware 50/50
	_____	_____	GIM Tax Aware 60/40
	_____	_____	GIM Tax Aware 75/25
SARATOGA CAPITAL MANAGEMENT	_____	_____	Saratoga Capital Management - Dynamic Moderate Balanced
	_____	_____	Saratoga Capital Management - Dynamic Aggressive Balanced
	_____	_____	Saratoga Capital Management - Dynamic Aggressive Equity
	_____	_____	Other: _____
	_____	_____	**Confident Retirement Plan** Income and Growth Bucket combined *(percentage in each bucket is dependent on current rates and required income needed from investment)*
		0	**Total for complete portfolio change must equal 100%.**

Important Notes:

- Each model selected for the overall portfolio must have a minimum of $25,000.
- Model changes can ONLY be requested every 90 days.
- Forms received by 11:00 am CST will be processed on the day of receipt, on a best efforts basis. All other forms will be processed on the next business day.
- Please be aware that the sell of securities may take up to three days to settle and holiday market closures will add additional processing time.
- Return completed and signed form by email, fax or mail to the following:

  Fax: (817)877-0741
  Email: CustomerService@GIMLink.com
  Mail: 309 West 7th Street, Suite 101, Fort Worth, TX 76102-6901

Client or Advisor Signature: _____ Date: _____