

**MODEL CHANGE REQUEST FORM**

Axos Advisor Services Accounts

**GREEN INVESTMENT MANAGEMENT, INC.**500 W. 7<sup>th</sup> St. Ste 827, Fort Worth, TX 76102

Account Title: \_\_\_\_\_

Account Number: \_\_\_\_\_

**Previous Model  
Percentage****New Model  
Percentage****Model Name****GIM Guardian Models**

Fixed Income

Balanced Income 30/70

Balanced Retirement Income

Conservative Balanced 50/50

Balanced 60/40

Balanced Growth 75/25

Balanced Mosaic

Global Stock

Equity Mosaic

Alternatives

Sector

Country

Disruptive Technologies

**GIM Tax Aware Models**

Tax Free Bond

Tax Aware 50/50

Tax Aware 60/40

Tax Aware 75/25

**GIM CRP Fixed Income Model** *(personalized to fit your specific needs)***GIM Cash Plus Model****GIM Strategic Models**

Strategic Global Balanced

Strategic Global Balanced Tax Aware

**Saratoga Capital Management Models**

Dynamic Moderate Balanced

Dynamic Aggressive Balanced

**Other** *(with approval)* \_\_\_\_\_**Total** *(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: 500 West 7<sup>th</sup> Street, Suite 827, Fort Worth, TX 76102

Client or Advisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_