

CLIENT NAME: _____

DayOne Reliance is offering a choice of Investment Portfolios for the Special Needs Trust. This is a one-time option which is only available upon enrollment.

Please choose from the following:

- A. a conservative portfolio with a higher concentration in bonds and income producing assets.

- B. a balanced portfolio with a higher concentration of equity assets.

*** If you do not wish to make a selection you will automatically be enrolled into the Balanced Portfolio.**