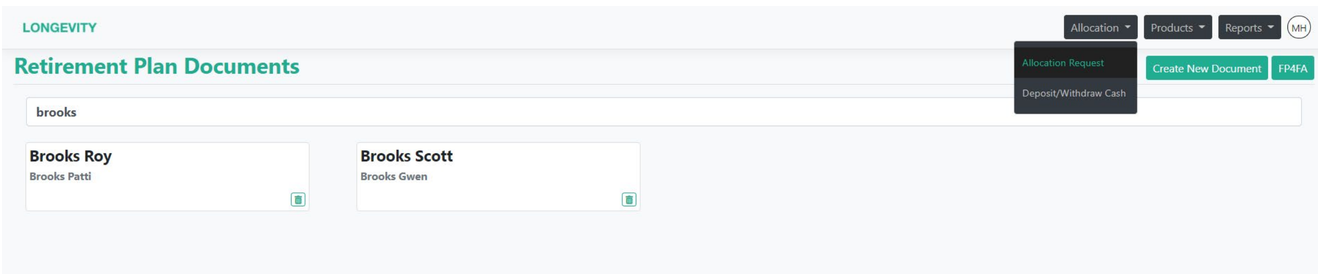
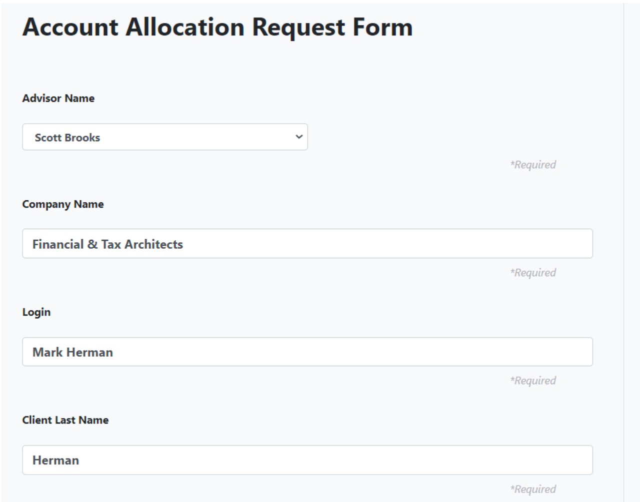
Submitting Allocations through Longevity

Once you are logged into Longevity in the top right corner you will see an allocation tab with a drop down. If you are submitting a new allocation or reallocating the account you click Allocation Request.



Now you will be at the “Account Allocation Request Form” as shown below. Input all the necessary information, Advisor, Client Last name, Client First name, type of account, account #, custodian, select if a new investment or re-allocation, size of account, and if any should be left in cash for a pending annuity.


Account Allocation Request Form

Advisor Name

Scott Brooks

*Required

Company Name

Financial & Tax Architects

*Required

Login

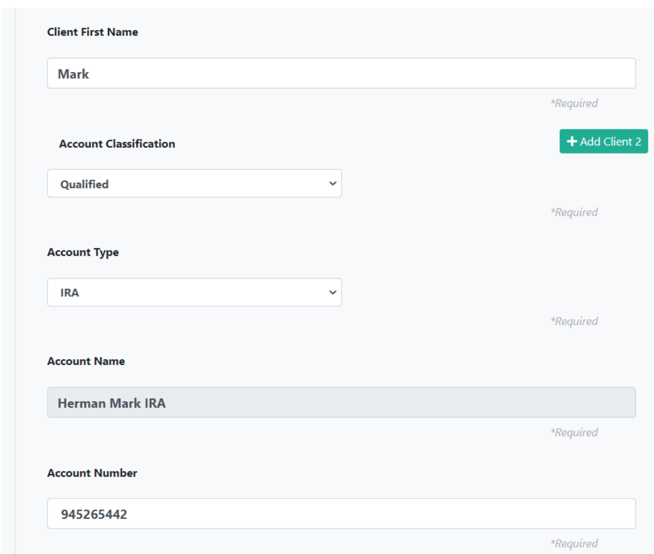
Mark Herman

*Required

Client Last Name

Herman

*Required


Client First Name

Mark

*Required

Account Classification

+ Add Client 2

Qualified

*Required

Account Type

IRA

*Required

Account Name

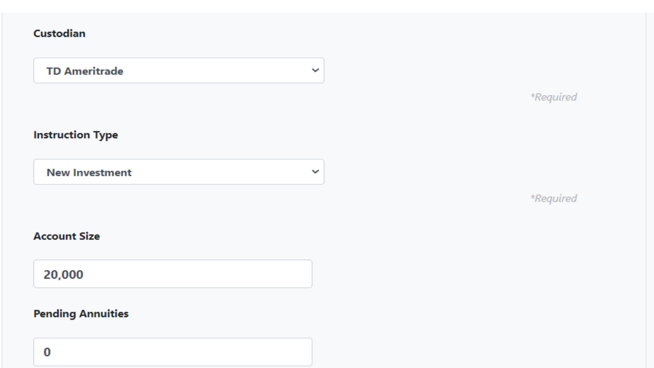
Herman Mark IRA

*Required

Account Number

945265442

*Required


Custodian

TD Ameritrade

*Required

Instruction Type

New Investment

*Required

Account Size

20,000

Pending Annuities

0

Next you will double click next to the strategies you are using to allocate the account and input the percentage for each strategy.

Lower Risk Strategies

Investment Name	Min. Investment	%	Mgmt Fee
Strategic Hedged Income	$1,000		0.75%
High Yield Corporate Bond	$1,000		0.75%
Strategic Enhanced Bond	$1,000	25	0.75%
Sleep Well Bond	$1,000		0.75%

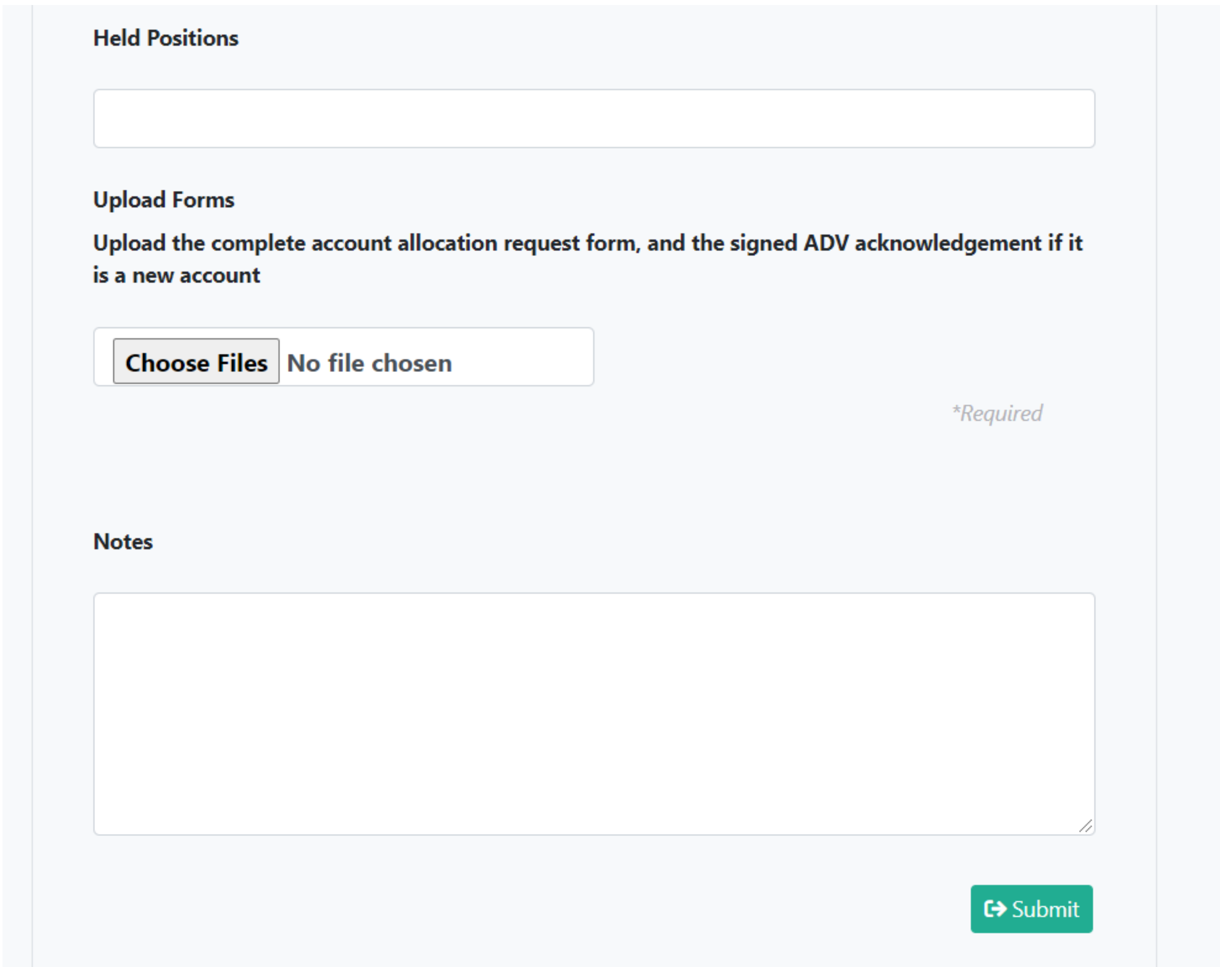
Moderate Risk Strategies

Investment Name	Min. Investment	%	Mgmt Fee
Foundation	$2,000		0.75%
U. S. Prime Dividend	$20,000	40	0.75%
U. S. Prime Dividend Jr	$1,000		0.75%
Global Sector	$1,000		0.75%
Prime Dividend International	$10,000		0.75%
Economic Cycle	$1,000		0.75%
Strategic Mid Cap	$1,000	10	0.75%
Country Rotation	$5,000		0.75%
Employment Trends Strategy	$1,000		0.75%
Sector Growth	$5,000		0.75%

Growth Strategies

Investment Name	Min. Investment	%	Mgmt Fee
NASDAQ Leaders	$20,000		0.75%
Value Discount	$1,000	25	0.75%
Reflation Strategy	$1,000		0.75%
Broad Value	$1,000		0.75%
Total Investment:		100%	

Next there is a place for “held positions.” This is where you would put any tickers you do not want to liquidate. For instance you are allocating a taxable account and liquidating a specific position would mean considerable capital gains, so you plan to sell it over time. After this you will need to upload the ADV acknowledgment if it is a new account and the signed account allocation request form. Lastly there is a place to put notes and you click submit. You will receive an email letting you know that your allocation request was received by the trading team.



Held Positions

Upload Forms

Upload the complete account allocation request form, and the signed ADV acknowledgement if it is a new account

Choose Files No file chosen

*Required

Notes

Submit