



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.

A screenshot of the Longevity web application interface. At the top left, the word "LONGEVITY" is displayed in a teal font. Below it, the page title "Retirement Plan Documents" is shown in a teal font. On the right side of the header, there are several navigation elements: a dark grey "Allocation" dropdown menu, a dark grey "Products" dropdown menu, a dark grey "Reports" dropdown menu, and a circular profile icon labeled "MH". The "Allocation" dropdown menu is open, showing two options: "Allocation Request" (highlighted in teal) and "Deposit/Withdraw Cash". Below the header, there is a search bar containing the text "brooks". Below the search bar, there are two document cards. The first card is titled "Brooks Roy" with the subtitle "Brooks Patti" and a small teal icon in the bottom right corner. The second card is titled "Brooks Scott" with the subtitle "Brooks Gwen" and a small teal icon in the bottom right corner.

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
 *Required

Company Name
 *Required

Login
 *Required

Client Last Name
 *Required

Client First Name
 *Required

Account Classification
 *Required [+ Add Client 2](#)

Account Type
 *Required

Account Name
 *Required

Account Number
 *Required

Custodian
 *Required

Instruction Type
 *Required

Account Size

Pending Annuities

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