

EMPLOYEE & PARTNER ACCOUNT ADDENDUM - ADVISORY

Additional Account Numbers

Check the appropriate box below

Level Four Financial - *Partner Account*

Level Four Financial Partners and immediate family in their Household

- LFCM Managed Account Benefits:
 - 0.00% Annual Advisory Fee on account(s)
 - 0bp LFCM sub-advisor charge*
- Rep Managed Account Benefits:
 - 0.00% Annual Advisory Fee on account(s)

NAME OF LEVEL FOUR FINANCIAL *Partner*: _____

If account is for Immediate family member, please identify relationship to Partner: _____

Level Four Financial - *Employee Account*

Available for Level Four Financial employees and immediate family in their Household

- LFCM Managed Account Benefits:
 - 35bp (.35%) Minimum Annual Advisory Fee on LFCM SMA account(s)
 - 35bp LFCM sub-advisor charge for SMA account management*
 - 15bp (.15%) Minimum Annual Advisory Fee on LFCM Asset Allocation account(s)
 - 15bp LFCM sub-advisor charge for Asset Allocation account management*
- Rep Managed Account Benefits:
 - 0.00% Minimum Annual Advisory Fee on account(s)

NAME OF LEVEL FOUR FINANCIAL *Employee*: _____

If account is for Immediate family member, please identify relationship to Employee: _____

Carr, Riggs & Ingram (CRI) employee - *Partner Account*

Available for Partners of CRI. Named partner must be the Individual or Joint account holder on account

- LFCM Managed Account Benefits:
 - 75bp (.75%) minimum Annual Advisory Fee on LFCM SMA account(s)
 - 35bp LFCM sub-advisor charge for SMA account management*
 - 50bp (.50%) minimum Annual Advisory Fee on LFCM Asset Allocation account(s)
 - 20bp LFCM sub-advisor charge for Asset Allocation account management*

NAME OF CARR RIGGS & INGRAM *Partner*: _____