

**Account Application**

Name(s) \_\_\_\_\_

Mailing Address \_\_\_\_\_  
\_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_

Referred by \_\_\_\_\_

MARKETTREND<sup>SM</sup> Advisors (MTA) provides portfolio management and portfolio consultation in accordance with your investment objectives and financial goals. Your answers to the following questions and inputs begin to shape our understanding of your objectives. However we recognize that these questions may only provide an initial view of your goals and objectives. Therefore, please provide as much information as you can regarding your investment philosophies, preferences, risk concerns, and any other information that might be helpful in managing your assets. (Use additional pages as necessary.)

**I am interested in the following investment choices:**

*If you have an asset allocation preference, please indicate it by showing %s for each choice. Each strategy requires its own separate account.*

\_\_\_ MTA Index Investment Service - Investing using our trend following discretionary long/short signal and other indicators

\_\_\_ MTA World Index Investment Service - This trend following discretionary long/short World Index strategy invests in the top 5 World Index Sector Funds on Long and can go short in down markets. It is rebalanced monthly.

\_\_\_ MTA Alta Vista Investment Service - A trend-following global tactical asset allocation strategy that incorporates timing mechanisms to target consistent 10%+ annual returns with less than 10% maximum draw-downs.

\_\_\_ MTA Sector Investment Service - This discretionary long only strategy invests in the top 10 Sector Funds and is rebalanced at least quarterly. Can be in cash during down markets.

\_\_\_ MTA Balanced Portfolio Investment Service - Applies our trend-following methods to a traditional asset allocation strategy for a very low volatility conservative result. Can be short during down markets.

\_\_\_ MTA Income Investment Service - This discretionary strategy aims to deliver current income with low volatility. Can be in cash during down markets.

\_\_\_ MTA Turbo Trading Investment Service - An active trading system for aggressive investors based on the TimingCube Turbo Model.

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**Investment Objectives and Risk Profile:**

The following series of very basic questions attempts to provide an initial profile of your investment objectives and risk tolerance. Please feel free to add comments on additional pages where necessary to clarify your responses.

*Rank the following investment objectives from 1 - most important to 4 - least important:*

- \_\_\_ Preservation of Capital
- \_\_\_ Income
- \_\_\_ Moderate Growth – returns equivalent to the broader market
- \_\_\_ Aggressive Growth – returns above the broader market

*You are willing to take the following amount of risk in pursuit of your investment objectives:*

- I am comfortable with the risk inherent in stock market investing
- I can tolerate a 10% monthly loss in pursuit of above-market gains – Note: the MTA World Index strategy is very active and aggressive. Though management techniques are used to limit losses on any one trade, you could quickly lose 10% or more of your account value in pursuit of these above-market returns.
- I do NOT want the account balance to fall below its initial value

**What percentage of your Net Worth are we managing?**

The investment capital being considered to invest with MTA represents roughly the following percent (%) of my total net worth:

- 75-100%       50-75%       25-50%       less than 25%

Please return completed application to: MARKETTREND Advisors  
3720 Gattis School Road #800-214  
Round Rock, TX 78664

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E-mail: info@MarketTrendAdvisors.com  
URL: www.MarketTrendAdvisors.com