

Account Application

Name(s) _____

Mailing Address _____

Home Phone _____ Work Phone _____

Cell Phone _____ Fax _____

E-mail _____

Referred by _____

MARKETTRENDSM 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

- Use Margin - this has higher return potential, but will also have the greatest volatility
- Use Options - you must already have options approval, or complete the Fidelity options application

___ 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 Wealth Builder Investment Service - This trend following strategy combines our long/short approach with an asset class/sector rotation to create a steady method to consistently build your wealth.

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

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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

Other contact information: Phone: (512) 255-8722
Fax: (512) 255-8732
E-mail: info@MarketTrendAdvisors.com
URL: www.MarketTrendAdvisors.com