

# LVZ Dollar Cost Averaging Form



**Effective Date of this change is** \_\_\_\_\_

Account Registration: \_\_\_\_\_

Account is held at: \_\_\_\_\_

Account Number: \_\_\_\_\_

Current Model Portfolio: \_\_\_\_\_

\_\_\_ Please allocate my investment into the model over 12 months

\_\_\_ Please allocate my investment into the model over 24 months

I acknowledge the following:

There may be transaction charges and tax consequences to this change and have reviewed them before requesting this change.

That this change in risk profile may affect my long term stated objectives and I have sought appropriate counsel to determine is appropriateness.

Sincerely,

\_\_\_\_\_  
Account Holder (Print)

\_\_\_\_\_  
Account Holder (signature)

\_\_\_\_\_  
Joint Account Holder (Print)

\_\_\_\_\_  
Joint Account Holder (signature)