

## Additional Deposit Form

Client ID (Brinker Use Only): \_\_\_\_\_

### 1 Your Current Account Information.

Client Name (First, M.I., Last)	Social Security Number
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This section must be completed in full in order for the requested changes to be made. If there are any questions regarding the registrations marked, or instructions on this form, Brinker Capital Investments, LLC ("Brinker") will contact you or your representative for clarification. Please list below the accounts affected by this change:

Account Type (e.g. IRA)	Custodian	Custodial Account #	Deposit Amount

### 2 Custodial Payee Info.

Please make your check(s) payable to the appropriate custodian: Constellation Trust Company, Fidelity, Schwab, or TD Ameritrade.

### 3 Special Instructions.

- ☐ Allocate 100% of this additional deposit into my investments according to my investment model.
- ☐ Hold 100% of this additional deposit in cash/money market until further notice.
- ☐ Hold \$\_\_\_\_\_.00 of this additional deposit in cash/money market until further notice. I understand the remaining amount of this deposit will be allocated according to my investment model.
- ☐ Enroll in Dollar Cost Averaging (DCA). *Must complete section 4 below.*

### 4 Dollar Cost Averaging Instructions.

DCA instructions will only apply to this deposit.

Duration of DCA: ☐ 3 Months ☐ 6 Months ☐ 9 Months ☐ 12 Months

Transaction process date: ☐ 1st of the month OR ☐ 15th of the month

Monthly Amount to be Invested (\$30,000 minimum for a newly established DCA): \$\_\_\_\_\_

### 5 Client Signatures.

Client Signature (required)	Date
Co-Client Signature	Date