

Complete and return to:
 Brinker Capital Investments, LLC
 17605 Wright Street
 Omaha, NE 68130
 Telephone: 888-455-4244
 Fax: 402-493-2811
 Email: CLSSG1@orion.com

This change request form contains the most commonly requested account changes. Please complete the appropriate sections, provide the requested information, and sign and date this form. **Please return this form to Brinker at the address listed above.**

1
Account Information. Please Print.

Plan Name:

Plan Sponsor:

2
Address Change. You must also contact your TPA and/or Record Keeper to update your address in their records.

New Address:

Phone:

City:

State:

Zip:

Previous Address:

Phone:

City:

State:

Zip:

3
Name Change. You must also contact your TPA and/or Record Keeper to update your name in their records.

Please complete this section if you would like to change the name on your account.

New Name:

Previous Name:

4
Termination of Services.
☐

By initialing this box, Plan Sponsor hereby terminates the Plan's Investment Advisory Agreement with Brinker. Please cancel all Brinker Investment Advisory Services on the Plan effective immediately. Plan Sponsor understands that management of all Plan Participant accounts will be cancelled and will remain invested in their current allocation.

The Plan Sponsor hereby represents and warrants that each affected Plan Participant has been given appropriate and sufficient notice regarding such termination.

5
Special Instructions.

Please use this section to specify requested changes not set forth above.

6 Amendments to the Plan Sponsor Agreement.

Change of Services to the Plan Sponsor Agreement

Please amend our Plan Sponsor Agreement by removing the investment advisory service(s) identified below as an option under our Plan and move all the affected Plan Participants to the replacement investment advisory service indicated:

Service to be Removed

- ☐ AdvisorOne Portfolio
- ☐ CPM/Hybrid-75
- ☐ IAM
- ☐ IAM - American Funds

Replacement Service to be Implemented

- ☐ AdvisorOne Portfolio
- ☐ IAM
- ☐ IAM - American Funds

Plan Sponsor understands and agrees that this change shall be effective for all Plan Participant accounts currently being managed in the removed investment advisory service. This change shall affect both Plan Participant accounts being managed in the removed service at the "Plan Level" pursuant to an investment advisory agreement directly with the Plan Sponsor as well as Plan Participant accounts being managed in the removed service at a "Participant Level" pursuant to a direct investment advisory agreement between the Plan Participant and Brinker. The Plan Sponsor understands and agrees that this change in investment advisory services may represent a change in management methodologies and hereby represents and warrants that the Plan Sponsor has given each affected Plan Participant appropriate and sufficient notice regarding such change. Plan Sponsor agrees to indemnify and hold Brinker harmless for carrying out instructions of the Plan in accordance with this request.

7 Change of Solicitor/Representative/Broker-Dealer.

The purpose of this section is to inform you that Brinker pays solicitors for referring clients.

Please change the Solicitor on my account. Below is a new Solicitor Disclosure Statement with the updated Solicitor information. **A new Exhibit A to the Plan Sponsor Agreement, signed by the Solicitor, must be attached to this Change Request Form indicating the advisory fees agreed to by the Plan Sponsor.** Please contact your TPA to obtain a new Exhibit A.

Solicitor Disclosure Statement

Solicitor's Name _____ of _____
Rep Code: _____

Solicitor's Registered Investment Adviser/Broker/Dealer

(collectively "we") would like to introduce you to Brinker Capital Investments, LLC ("Brinker") for the purpose of you possibly becoming an investment advisory client of Brinker.

We have an arrangement with Brinker under which we refer prospective clients to Brinker in exchange for a referral fee. In accordance with your agreement with Brinker, you will be charged an investment advisory fee. In exchange for referring you to Brinker, we will receive a portion of that advisory fee from Brinker. The referral fee we receive from Brinker for assisting with your relationship may be an amount up to 100% of your investment advisory fee. In addition to the referral fees paid to us for referring you to Brinker may also pay referral fees to us for introducing other advisers to Brinker. These adviser referral fees are flat fees based upon the total assets brought to Brinker through the referral. While the referral fees paid to us by Brinker are not directly billed to clients, our relationship with Brinker may affect their willingness to negotiate a fee lower than their standard investment advisory fee and, therefore, may affect the advisory fees paid by referred clients such as you.

We are not affiliated with Brinker and we are not authorized to provide investment advice on behalf of Brinker or to act for or bind Brinker. No investment advisory agreement with Brinker will become effective until accepted by Brinker at its offices in Omaha, Nebraska.

8 Signature.

The purpose of this section is for you to affirm to us that you have read, understand, and agree to all the terms found in this Change Request Form. This Change Request Form must be signed by a Trustee authorized by the Plan as supported by appropriate documentation.

I acknowledge that I have received Brinker's Form CRS.

I hereby authorize Brinker Capital Investments, LLC to make the changes indicated above. I further certify that I have full legal power and authority to authorize the changes requested above and the information provided and contained herein is complete and accurate. I agree to indemnify and hold Brinker harmless for carrying out the changes requested herein.

If the Solicitor on my account has changed, I hereby acknowledge that I have received a copy of Brinker's ADV Part 2, as well as a copy of the Solicitor's Disclosure Statement describing the arrangements between Solicitor and Brinker.

Plan Sponsor/Trustee Signature _____ Date _____

9 FOR OFFICE USE ONLY - Accepted by Brinker Capital Investments, LLC

Authorized Signature _____ Printed Name _____ Date _____