



IFA IMPLEMENTATIONS

Please use this menu to let us know how you want to implement your index portfolio. If you need help with this form, please contact your IFA Wealth Advisor. Please send this back to your advisor when completed.

YOUR NAME

CONTACT EMAIL / PHONE NUMBER

DATE

YOUR ADVISOR

To determine your Stock/Bond allocation, visit www.ifa.com/survey and take our Risk Capacity Survey.

%
STOCKS
 IFA DEFAULT

FUND MANAGER

Dimensional
 Avantis
 Vanguard
 Multi-Manager

FACTOR TILTS

Small Cap
 Mid Cap
 Large Cap

Factor Neutral
 Profitability
 Core Funds

%
BONDS
 IFA DEFAULT

FUND MANAGER

Dimensional
 Avantis
 Vanguard
 Multi-Manager

ISSUER

Government / Corporate
 Tax-Advantaged Munis

California
 New York
 National

RISK/RETURN EXTENSIONS

Maturities
 Credit
 Both