



FRESH LOOK AGREEMENT

This is an agreement between Fountain Strategies, LLC, a California limited liability company (“We”) with its principal office at 938 W. Carmel Valley Road, Carmel Valley, California, and _____ (“You”).

Preface. The term “Financial Planning” can include both *life planning* services and *investment management* services. Fresh Look focuses upon life planning services; it is designed to help those who seek a second opinion or a better way to proceed with their life planning and who do not require investment account management beyond the scope of review and general guidance.

Advisory Services. We will work with you for a period of three months to help you perfect your personal retirement plan, working from shared access to your password-protected online account at MoneyGuidePro. This will include collection, analysis, and arrangement of your data; suggesting changes which may serve to improve the quality and amount of your retirement resources; and setting up “What If?” comparisons from which you can choose the most suitable course of action. At or before the end of three consecutive months, you can print the plan directly from MoneyGuidePro for personal use.

Your Responsibilities – Provision of Information. The value and usefulness of the advisory services described above rely upon your active participation in determining your financial planning objectives, identifying your acceptable tolerance for taking investment risk, and your willingness to consider a few or several “What If?” possibilities.

Length of Agreement. This Agreement will remain in effect throughout three consecutive calendar months and then terminate. This Agreement is not renewable. However, if you elect to continue with a Fountain advisor in either a Financial Planning and Investment Management relationship or a Financial Planning Only relationship, you will not be required to pay the \$500 initial setup fee for those plans.

