
**CHANGE OF PERFORMANCE BENCHMARKS
ACKNOWLEDGMENT OF USE / CONFIGURATION REQUEST FORM**

On behalf of _____ (“Advisor”), I am requesting **Investnet Asset Management, Inc.** (“Investnet”) to configure Advisor’s Investnet platform website for the removal or override of relative performance benchmarks for accounts for which Advisor or its designee serves as the financial advisor. *Please attach a spreadsheet if necessary or state “All” if the request is for all of Advisor’s accounts.*

(Advisor Name)

(Account Name/Number)

364 - Allow Account Benchmark Override

Allow the advisor to override the account level default benchmark for the selected product types. When turned on, advisors can choose benchmark from the accounts properties view.

Do not override – No override allowed for the product type

Override at Account – Allow the advisor to override/suppress the account level default primary benchmark or suppress the account level secondary benchmarks for the selected product types. Advisors can access these options from the account properties screen.

Override at Proposal – Allow the advisor to override the account level default primary benchmark with the configured proposal benchmark option (risk based, product based, or use underlying holdings for advisor models). Advisors can access this from the account setup screen during the proposal workflow.

Override at Account & Proposal – Allow the advisor to override the account level default primary benchmark with the configured proposal benchmark option (risk based, product based, or use underlying holdings for advisor models). Advisors can access this from the account setup screen during the proposal workflow.
Allow the advisor to override/suppress the account level default primary benchmark or suppress the account level secondary benchmarks for the selected product types. The account override option will also include proposal benchmark options. Advisors can access these from the account properties view.

- 728 - Allow Product Benchmark Override**
Allow advisors to override the benchmark for a product. The benchmark can be overridden through the update product screen.

- 417 - Allow Benchmark Override**
Allow advisors/sponsors to override the preferred benchmark for account groups from an available configured benchmark. The benchmarks can be set at the reporting group, investment group or client level through the client detail screen.
 - Override Group Benchmark** – Allow advisors/sponsors to override/hide the preferred primary benchmark or hide the secondary benchmarks for account groups at the reporting group, investment group or client level through the client detail screen.
 - Override All Secondary Benchmarks** – Allow advisors/sponsors to override the secondary benchmarks from an available list of configured benchmarks. The secondary benchmarks can be set globally in the client detail screen and will be applied across all levels – Client, investment group, reporting group and account

- 1249 - Allow Model Custom Benchmark Override**
Allow advisors and sponsor users to apply custom model benchmarks to APM/UMAv2 models.

- 953 - Can Remove QPR Benchmark**
Allow advisors to customize Include / Exclude benchmark brand value of the statement template.

- 659 - Config Disable Product Benchmarks**
Disable product derived benchmarks on performance reports for the selected product types. If selected, attribution analysis report will not be available.

- 1268 - Disable Client Benchmarks**
Option to disable the primary and secondary benchmarks at the client level for the new clients.

Home Office Acknowledgement:

Investnet produces the QPR to advisors/investors to offer a periodic comprehensive view of the account maintained by our Platform. Information and data contained in the standard QPR produced by Investnet is presumed to meet industry standards for an account fiduciary. By signing this form, you acknowledge that you are responsible for ensuring that the QPR still provides enough information and data to the investor to make a determination of the advisory services provided and that you are still fulfilling your fiduciary duty to the investor.

Approval:

Home Office Compliance Signature

Date

Home Office Compliance (Print Name)

Title