

iVest Enrollment Instructions



**1201 New Road
Suite 111
Linwood, NJ 08221
877.TOEWSCO (877.863.9726)
Fax 800.511.8490
www.toewscorp.com**

Instructions for Setting Up New Accounts for the Toews Corporation iVest Program

In order to enroll clients in the iVest program, you will need to complete both Toews Corporation paperwork and custodial paperwork (TD Ameritrade, Pershing, Jefferson National).

- 1. Complete Toews Corporation iVest Account Application which includes a Suitability Questionnaire and Client Agreement.

If there is a solicitation fee to collect, you need to enter your solicitation fee and the total program fee in the chart on Schedule 2. The solicitation fee can range from 0 bps to 150 bps in 10 bps increments. In addition, you may take 25 bps, 75 bps, or 125 bps. See guide below.

Fee Schedule for iVest Program		
Advisor Fee	Consultant's Fee	Total Program Fee
0.50%	0.00% (No Solicitor's Disclosure Statement Required)	0.50%
0.50%	0.10%	0.60%
0.50%	0.20%	0.70%
0.50%	0.25%	0.75%
0.50%	0.30%	0.80%
0.50%	0.40%	0.90%
0.50%	0.50%	1.00%
0.50%	0.60%	1.10%
0.50%	0.70%	1.20%
0.50%	0.75%	1.25%
0.50%	0.80%	1.30%
0.50%	0.90%	1.40%
0.50%	1.00%	1.50%
0.50%	1.10%	1.60%
0.50%	1.20%	1.70%
0.50%	1.25%	1.75%
0.50%	1.30%	1.80%
0.50%	1.40%	1.90%
0.50%	1.50%	2.00%

- 2. Issue to the client one ADV Part II for Toews Corporation and, if necessary, one ADV Part II for your RIA and/or other disclosure document per the requirement of the Consultant (your Broker/Dealer, RIA).
- 3. Complete custodial paperwork (TD Ameritrade, Pershing, Jefferson National) per the custodian's instructions.
- 4. Complete account transfer form and/or collect check payable to the custodian for amount of investment (for example, check should be cut to "TD Ameritrade, FBO Bob Smith" .
- 5. Send all paperwork (except ADV Part II) to Toews Corporation or otherwise follow the internal procedures of your Broker-Dealer and/or RIA. However, the **ORIGINAL** of the Toews Corporation iVest Account Application that includes a Suitability Questionnaire and Client Agreement **MUST** be sent to our office. If an Investment Policy Statement was run in conjunction with the start of the account, please send or fax a signed copy to our offices. Our fax number is 800.511.8490. Our address is: Toews Corporation, Cornerstone Commerce Center, 1201 New Road, Suite 111, Linwood, NJ 08221. Toews Corporation will forward applicable documents to your B-D or RIA and client.