



Name (LAST, FIRST, MIDDLE), Social Security Number, Date of Birth, Address (City, State, Zip), Home Phone, Work Phone, Employer, Plan Type (State, County)

INVESTMENT ELECTION FORM - DEFINED CONTRIBUTION

MEMBER FUNDS INVESTMENT ELECTION (FUTURE ONLY)

You must make your selection in whole increments. The total must equal 100%. Funds are not guaranteed as to rate of return or principal stability.

Investment fund selection grid with columns for Investor Select, U.S. Bond Index, Stable Value, International Stock Index, U.S. Total Stock Market Index, Global Equity, U.S. Core Plus Bond, LifePath Index 2070*, 2065*, 2060*, 2055*, 2050*, LifePath Index 2045*, 2040*, 2035*, 2030*, and LifePath Index Retirement*.

*LifePath Index funds are a mix of stocks, bonds, etc. that gradually adjust to provide asset allocations that seek to mitigate risk closer to your intended retirement date.

MEMBER BALANCE TRANSFERS

A transfer will move a dollar amount OR % of your existing member funds from one investment fund to another.

Transfer form with four rows: TRANSFER \$ _____ OR _____ % from the _____ FUND, into the _____ FUND.

EMPLOYER FUNDS INVESTMENT ELECTION (FUTURE ONLY)

You must make your selection in whole increments. The total must equal 100%. Funds are not guaranteed as to rate of return or principal stability.

Investment fund selection grid for employer funds, identical to the member funds section.

*LifePath Index funds are a mix of stocks, bonds, etc. that gradually adjust to provide asset allocations that seek to mitigate risk closer to your intended retirement date.

EMPLOYER BALANCE TRANSFERS

A transfer will move a dollar amount OR % of your existing employer funds from one investment fund to another.

Transfer form for employer funds with four rows: TRANSFER \$ _____ OR _____ % from the _____ FUND, into the _____ FUND.

I understand that my funds may not be withdrawn from the plan except in the event of termination, retirement, death or disability. I authorize the above changes, and certify that the above information is accurate.

Member Signature: _____ Date: _____