

Questions? Call our National Service Center at 800.747.3942.

Instructions

Use this form to automatically transfer account values to maintain a specific percentage allocation among your current and/or future investment options. Complete the entire form. Please type or print.

1. Provide General Account Information

Plan Number _____ Social Security Number _____

Participant Name _____
First MI Last

Mailing Address: _____
Line 1 Line 2
City State Zip Code

Daytime Phone Number _____ Mobile/Home Phone Number _____

2. Set Up Asset Reallocation

Check all that apply.

A. Number of Reallocations:

One-time reallocation, effective _____
Date (mm/dd/yyyy)

If no date is indicated, or date indicated is prior to the date of receipt, the first transfer will occur on the date the request is received in proper form.

Recurring – reallocation will occur on the first business day of the next month according to the frequency selected.
Frequencies are based on a calendar year.

- Monthly
- Quarterly
- Semi-Annually
- Annually

B. Future Allocations (select one):

- Allocate future contributions according to the percentages indicated on this form.
- Do not change the allocation of future contributions.
If no option is indicated above, the allocation of future contributions will not be changed.

C. Automatic Asset Reallocation (select one):

- Cancel
- Update Automatic Asset Reallocation to funds indicated in Section 3.

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