

## INVESTMENT ELECTION AND TRANSFER FORM

**Plan Name:** \_\_\_\_\_

**Participant Name:** \_\_\_\_\_  
Print or Type Complete Legal Name – First, MI, Last

**Social Security Number:** \_\_\_\_\_

**Street Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

<b>SECTION 1: TRANSFER ALL CURRENT ACCOUNT BALANCES ELECTION</b>
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I elect to transfer **ALL** current account balances in **ALL** current accounts as follows (complete Section 1 and Section 4 (**DO NOT** complete Section 2)):

**Note:** Future contributions will continue to be allocated as they were prior to any transfer requested in this Section unless Section 3 is completed.

**New Current Allocation Percentage:**  
(Whole Percentages)

**Fund Name:**  
(Exact Fund Name)

% _____	_____
% _____	_____
% _____	_____
% _____	_____
% _____	_____
% _____	_____
% _____	_____
% _____	_____
% _____	_____
% _____	_____

% \_\_\_\_\_  
**(Must Equal 100%)**

<b>SECTION 2: TRANSFER SPECIFIC ACCOUNT BALANCES ELECTION</b>
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I elect to transfer specific account balances as follows (complete Section 2 and Section 4 (**DO NOT** complete Section 1)):

**Note:** Future contributions will continue to be allocated as they were prior to any transfer requested in this section unless Section 3 is completed.

**Transfer From Amount:**  
(Dollar Amount or Whole Percentages)

**Transfer From Fund:**  
(Exact Fund Name)

**Transfer To Amount:**  
(Dollar Amount or Whole Percentages)

**Transfer To Fund:**  
(Exact Fund Name)

\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____
\$/% _____	_____	\$/% _____	_____

