

U.A. LOCAL 393
DEFINED CONTRIBUTION PLAN

ELECTION AND ALLOCATION FORM

SECTION A: PARTICIPANT IDENTIFICATION (Print clearly in ink)		
First Name:	Middle Init:	Last Name:
Social Security Number:		Date of birth:
Mailing Address:		Tel Num:
City:	State:	Zip Code:
By signing below, I certify that I understand and acknowledge the financial risk involved with Fund Selection and willingly accept that responsibility; and that I have received educational materials and have attended a seminar about the program. I certify under penalty of perjury that the information on this form is correct.		
Signature:		Date:
SECTION B: FUND ALLOCATION (Print clearly in Ink) I understand that: I may move the balance of my account and allocate all new contributions into the Funds selected, provided I meet the necessary requirements; I may allocate my investments in one or more investment options, provided that the allocation is in 1% increments and the total is equal to exactly 100%. I hereby elect to allocate my Existing Balance and/or my Future Contributions in the following percentages:		
INVESTMENT CHOICES (Effective 07/22/24)	EXISTING BALANCE	FUTURE CONTRIBUTION
SEPARATELY MANAGED INVESTMENTS		
Balanced Pooled Account	%	%
INDIVIDUAL MUTUAL FUNDS		
American Funds EuroPacific Growth (RERGX)	%	%
American Funds Growth Fund of America (RGAGX)	%	%
American Funds Investment Co of America (RICGX)	%	%
American Funds Retire Inc. Port-Cnsrv R6 (RTRPX)	%	%
Federated Hermes Mid-Cap Index R6 (FMCLX)	%	%
Fidelity Advisor Total Bond I (FEPIX)	%	%
Franklin Small-Mid Cap Growth Adv. (FSGAX)	%	%
Hotchkis & Wiley Small Cap Divers Val I (HWVIX)	%	%
iShares Short Term TUPS Bond Index K (BKIPX)	%	%
Janus Henderson Overseas N (JDINX)	%	%
JP Morgan Investor Growth R6 (JFTUX)	%	%
MetLife Stable Value Fund	%	%
MFS Mid Cap Value R6 (MVCKX)	%	%
PGIM Global Total Return R6 (PGTQX)	%	%
PGIM High Yield R6 (PHYQX)	%	%
Putnam Large Cap Value (PEQSX)	%	%
Putnam Small Cap Growth R6 (PLKGX)	%5	%
Vanguard Balanced Index Adm (VBIAX)	%	%
Vanguard Emerging Markets Stock Index Adm (VEMAX)	%	%
Vanguard Growth Index Fund Adm (VIGAX)	%	%
Vanguard Institutional Index I (VINIX)	%	%
Vanguard Intermediate Term Bond Index Adm (VBILX)	%	%
Vanguard Long-Term Bond Index Adm (VBLAX)	%	%
Vanguard Mid-Cap Growth Index Adm (VMGMX)	%	%
Vanguard Mid-Cap Value Index Adm (VMVAX)	%	%
Vanguard Real Estate Index Adm (VGSLX)	%	%
Vanguard Small Cap Growth Index Adm (VSGAX)	%	%

Vanguard Small Cap Value Index Adm (VSIAX)	%	%
Vanguard Total Intl Stock Index Adm (VTIAX)	%	%
Vanguard Value Index Fund Adm (VVIAX)	%	%
TARGET DATE RETIREMENT FUNDS:		
American Funds Target Date 2010 R6 (RFTTX)	%	%
American Funds Target Date 2015 R6 (RFJTX)	%	%
American Funds Target Date 2020 R6 (RRCTX)	%	%
American Funds Target Date 2025 R6 (RFDTX)	%	%
American Funds Target Date 2030 R6 (RFETX)	%	%
American Funds Target Date 2035 R6 (RFFTX)	%	%
American Funds Target Date 2040 R6 (RFGTX)	%	%
American Funds Target Date 2045 R6 (RFHTX)	%	%
American Funds Target Date 2050 R6 (RFITX)	%	%
American Funds Target Date 2055 R6 (RFKTX)	%	%
American Funds Target Date 2060 R6 (RFUTX)	%	%
American Funds Target Date 2065 R6 (RFVTX)	%	%
TOTAL IN EACH COLUMN MUST EQUAL 100%	100 %	100%

Return form to:

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