

How to Make Investment Election Changes (online)

Log-in to your account at www.yourbenefitaccount.net/pensioninc/ or www.pensioninc.net

From the Dashboard Summary > Select Manage

Good Afternoon, Penny T Money
Last Login: May 10, 2022 1:57 PM EST

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Dashboard **Manage** Performance Loans & Withdrawals Forms & Reports Contact Us Disclosures Financial Wellness Plan Selection

My Dashboard Print

Drop Down Manage Menu > Select Manage Investments > Click on Change Elections

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Manage Investments Print

Your Balance
\$12,538.90

Vested Balance \$10,747.62

Change Elections

The investments you put the money from your paycheck into.

Move Money

Transfer the money in your account between the investments in your plan.

Rebalance

Make the balance match your existing target or set a new one.
Next auto rebalance date:

Change Contributions

Change how much money you put in your account from your paycheck.

Scroll Down Change Elections Page > Left Column is **CURRENT** Allocation/Right Column is **NEW** Election

pension inc Good Afternoon, Penny T Money
Last Login: May 13, 2022 1:55 PM EST

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Change Elections Print

Overall Progress: **0% Complete**

Enter Investment Election Percentages

Enter your **NEW** Investment Elections (on a go-forward basis) > Total Must = 100% > Click Next

Investment	Asset Class	Current Allocation %	New Election %
Fidelity 500 Index Institution... details	Large Blend	25%	<input type="text" value="0"/> %
Invesco Developing Markets details	Diversified Emerging Mkts	5%	<input type="text" value="0"/> %
PIMCO Commodity Real Ret Strat... details	Commodities Broad Bask...	0%	<input type="text" value="0"/> %
T. Rowe Price Growth Stock I details	Large Growth	25%	<input type="text" value="25"/> %
Vanguard International Value L... details	Foreign Large Value	20%	<input type="text" value="0"/> %
Vanguard Life Growth Fund details	Moderately Aggressive AI...	0%	<input type="text" value="75"/> %
Vanguard Life Strategy Cons Gr... details	Moderately Conservative ...	0%	<input type="text" value="0"/> %
Vanguard Life Strategy Income ... details	Conservative Allocation	0%	<input type="text" value="0"/> %
Vanguard Mid Cap Index Admiral... details	Mid-Cap Blend	15%	<input type="text" value="0"/> %
Vanguard Small Cap Index Adm details	Small Blend	5%	<input type="text" value="0"/> %
TOTAL		100%	100%

Answer 'Yes' or 'No' to Rebalance your Transferable Balances > Click Submit

 Change Elections  Print

Overall Progress: **20% Complete**

Transferable Balances

Would you like to rebalance your transferable balances in your plan to conform with the percentages you entered for your investment elections?

No Yes

Read Prospectus for Each Fund > Check Mark as Read > Click Next

 Change Elections  Print

Overall Progress: **60% Complete**

Read Prospectus

Have you read the prospectus for each fund?

Funds		<input checked="" type="checkbox"/> Mark all as Read
T. Rowe Price Growth Stock I	view prospectus	<input checked="" type="checkbox"/> Mark as Read
Vanguard Life Growth Fund	view prospectus	<input checked="" type="checkbox"/> Mark as Read

Review Election Changes > Scroll Down to Click Submit

 Change Elections  Print

Overall Progress: **80% Complete**

Review

Election Percentages

You will receive a **GREEN** Confirmation Code

 Change Elections 
Print

Overall Progress: **100% Complete**

Confirmation

 Confirmation Number: 418754.

All changes require an overnight cycle to appear online and will be processed as soon as administratively feasible in accordance with your plan provisions.
Read Summary Plan Description (located in Forms) for more information

*Please contact the Participant Support Center at 1.920.432.7020 or 1.877.865.7899
with any questions*