

How to Move Money Between Investments (online)

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

From the Dashboard Summary > Select Manage

pension inc

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

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 Move Money

Manage Investments Print

Your Balance
\$12,538.90

Vested Balance \$10,747.62

<p>Change Elections</p> <p>The investments you put the money from your paycheck into.</p>	<p>Move Money</p> <p>Transfer the money in your account between the investments in your plan.</p>	<p>Rebalance</p> <p>Make the balance match your existing target or set a new one. <u>Next auto rebalance date:</u></p>	<p>Change Contributions</p> <p>Change how much money you put in your account from your paycheck.</p>
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From the Transfer Funds Page > Select the transfer type (dollar to dollar or percentage to percentage). Please note the number of days to process the request.

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Transfer Funds -

Overall Progress: **0% Complete**

Enter Investment Transfer Amounts

Select transfer type
Percentage to Percentage

Transfer Rules
All investment options are priced once per day. Both the type of investment options and the time in which you submit your transaction will determine which day's "buy" and "sell" share prices will be used. **Transfer requests typically complete within 2 business days but may take up to 5 business days to complete. No additional liquidations will be allowed while funds are settling. Please review your request carefully as submitted transactions cannot be cancelled.** For more information on your specific transaction, please call our customer service team.

Days to complete request

Follow the Instructions to Transfer Money Between Selected Investments

Fidelity 500 Index Institution	details	Large Blend	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="50"/>	%
Invesco Developing Markets	details	Diversified Emerging Mkts	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
PIMCO Commodity Real Ret Strat		Commodities Broad Basket	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
T. Rowe Price Growth Stock I	details	Large Growth	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard International Value F	details	Foreign Large Value	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Life Growth Fund	details	Moderately Aggressive Allocation	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Life Strategy Cons Gr	details	Moderately Conservative Allocation	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Life Strategy Income	details	Conservative Allocation	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Mid Cap Index-Admiral	details	Mid Blend	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Small Cap Index Admir	details	Small Blend	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Strategy Moderate Gr	details	Moderate Allocation	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 201	details	Target-Date 2015	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 202	details	Target-Date 2020	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 202	details	Target Date Fund	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 203	details	Target Date Fund	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 203	details	Target Date Fund	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 204	details	Target Date Fund	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 204	details	Target Date Fund	100.00%	\$70,079.67	<input type="text" value="50"/>	%	<input type="text" value="0"/>	%
Vanguard Target Retirement 205	details	Target Date Fund	0.00%	\$0.00	<input type="text" value="0"/>	%	<input type="text" value="50"/>	%

AND Make Sure the Right Column = 100% > Click Next

Read Investment Prospectus > Check Mark as Read > Click Next

Transfer Funds - 

Overall Progress: **50% Complete**

Read Prospectus
Have you read the prospectus for each fund?

Funds		<input checked="" type="checkbox"/> Mark all as Read
Other Investments		
Fidelity 500 Index Institutional Pr	view prospectus	<input checked="" type="checkbox"/> Mark as Read
Vanguard Target Retirement 2045	view prospectus	<input checked="" type="checkbox"/> Mark as Read
Vanguard Target Retirement 2050	view prospectus	<input checked="" type="checkbox"/> Mark as Read

CANCEL BACK NEXT

Confirm your TRANSFERRED Funds Strategy > Click Submit

TRANSFERABLE FUNDS TOTAL	100.00%	\$70,079.67	100.00%
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A confirmation email will be sent to: molson@johnsonfinancialgroup.com [Edit](#)

CANCEL BACK **SUBMIT**

You will receive a **GREEN** Confirmation Code

Transfer Funds - 

Overall Progress: **100% Complete**

Confirmation

Confirmation Number: 490052

All changes require time 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