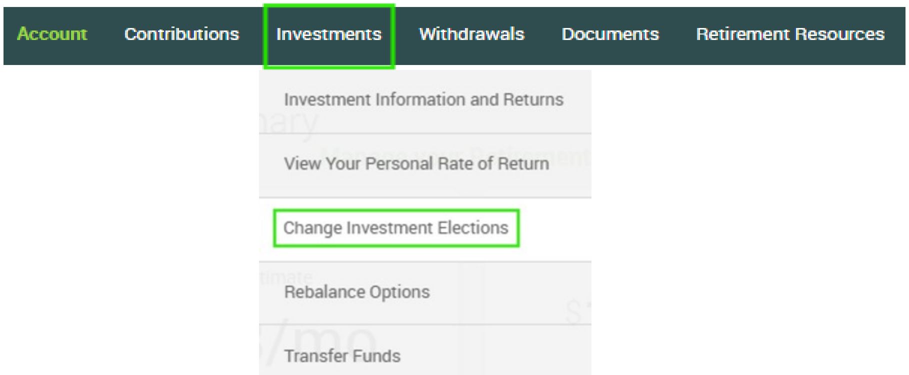
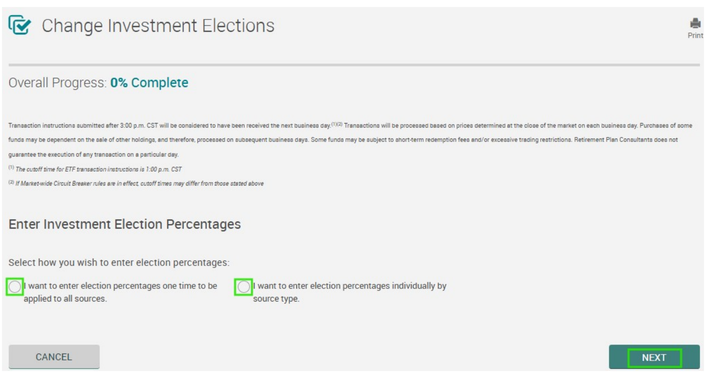
Update Investment Direction

From the top menu options choose **Investments** then **Change Investment Elections.**





Select if you would like to update the investment election for all sources or by source type.

Click **Next.**

If you chose to update the investment election by source type. Check the source you want to update investment election for and open the carat (**>**) to choose the funds.

Update Investment Direction

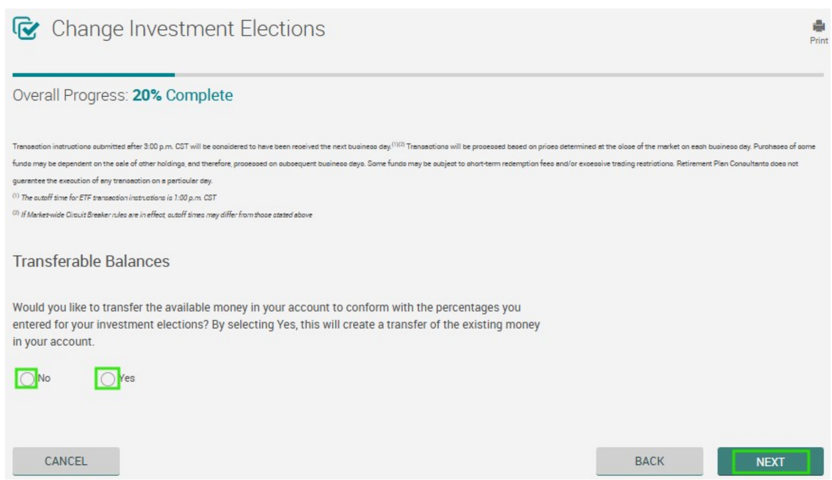
In the investment table, enter the percentage you wish to allocate to each investment, in the **New Election %** column. The total at the bottom must add up to 100%.

Upon completion, click **Next**.

Investment		Fund ID	Current Allocation %	New Election %
Available Customized Portfolios and Models				
Preferred Portfolio Income			100%	0 %
Preferred Portfolio 20			0%	0 %
Preferred Portfolio 40			0%	0 %
Preferred Portfolio 60			0%	0 %
Preferred Portfolio 80			0%	0 %
Preferred Portfolio 100			0%	0 %
Preferred Core Portfolio Incom...			0%	0 %
Preferred Core Portfolio 20			0%	0 %
Preferred Core Portfolio 40			0%	0 %
Preferred Core Portfolio 60			0%	0 %
Preferred Core Portfolio 80			0%	0 %
Preferred Core Portfolio 100			0%	100 %
Cash				
Matrix Retirement Cash Account	details	MTDDA	0%	0 %
Diversified Emerging Mkts				
DFA Emerging Markets Core Equi...	details	DFCEX	0%	0 %
Foreign Large Growth				
Vanguard International Growth ...	details	VWILX	0%	0 %
TOTAL			100%	100%

Choose if you would like to rebalance your current investment holdings to match your new elections under Transferable Balances by checking **No** or **Yes**.

Click **Next.**



Update Investment Direction

Read Prospectus

Have you read the prospectus for each fund?

Funds		Mark all as Read
Preferred Core Portfolio 100		
DFA Emerging Markets Core Equity 2 I	view prospectus	Mark as Read
DFA US Targeted Value I	view prospectus	Mark as Read
DFA Global Real Estate Securities Port	view prospectus	Mark as Read
DFA International Small Company I	view prospectus	Mark as Read
DFA International Value I	view prospectus	Mark as Read
DFA US Large Cap Value I	view prospectus	Mark as Read
DFA US Small Cap I	view prospectus	Mark as Read
DFA US Large Company I	view prospectus	Mark as Read
DFA International Small Cap Value I	view prospectus	Mark as Read

CANCEL BACK NEXT

Click on the view prospectus link to read the prospectus for the fund(s) chosen. Click the **Mark as Read** checkbox or select the **Mark all as Read** checkbox, if preferred.

Click **Next**.

Overall Progress: **80%** Complete

Transaction instructions submitted after 3:00 p.m. CST will be considered to have been received the next business day.[1][2] Transactions will be processed based on prices determined at the close of the market on each business day. Purchases of some funds may be dependent on the sale of other holdings, and therefore, processed on subsequent business days. Some funds may be subject to short-term redemption fees and/or excessive trading restrictions. Retirement Plan Consultants does not guarantee the execution of any transaction on a particular day.

[1] *The cutoff time for ETF transaction instructions is 1:00 p.m. CST*

[2] *If Market-wide Circuit Breaker rules are in effect, cutoff times may differ from those stated above*

Review

Election Percentages

Investment	Fund ID	Current Allocation %	New Election %
Available Customized Portfolios and Models			
Preferred Portfolio Income		100%	
Preferred Portfolio 20		0%	
Preferred Portfolio 40		0%	
Preferred Portfolio 60		0%	
Preferred Portfolio 80		0%	
Preferred Portfolio 100		0%	
Preferred Core Portfolio Incom...		0%	
Preferred Core Portfolio 20		0%	
Preferred Core Portfolio 40		0%	
Preferred Core Portfolio 60		0%	
Preferred Core Portfolio 80		0%	
Preferred Core Portfolio 100		0%	100%

SUBMIT

Review the percentages listed in the **New Election %** column are correct.

Click **Submit.**

A **Confirmation Number** will be provided and an email confirmation will be sent. Click **Done.**

Overall Progress: **100%** Complete

Transaction instructions submitted after 3:00 p.m. CST will be considered to have been received the next business day.[1][2] Transactions will be processed based on prices determined at the close of the market on each business day. Purchases of some funds may be dependent on the sale of other holdings, and therefore, processed on subsequent business days. Some funds may be subject to short-term redemption fees and/or excessive trading restrictions. Retirement Plan Consultants does not guarantee the execution of any transaction on a particular day.

[1] *The cutoff time for ETF transaction instructions is 1:00 p.m. CST*

[2] *If Market-wide Circuit Breaker rules are in effect, cutoff times may differ from those stated above*

Confirmation

Confirmation Number: 228172

DONE