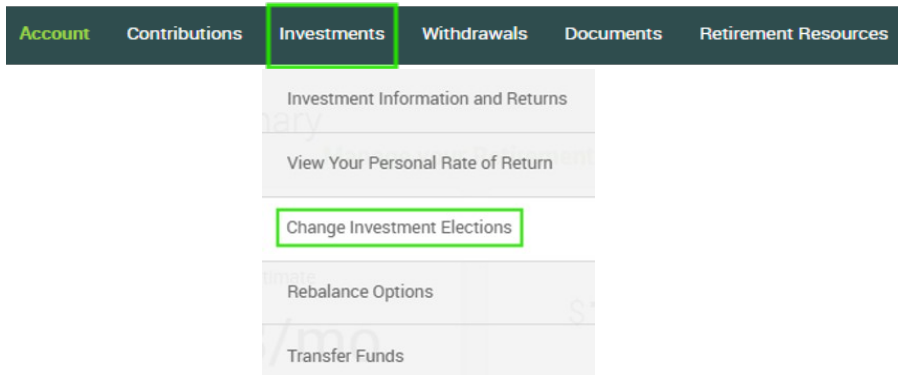




Update Investment Direction

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



Change Investment Elections

Overall Progress: **0% 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 EPP transaction instructions is 1:00 p.m. CST.
⁽²⁾ If Marketplace Circuit Breaker rules are in effect, cutoff times may differ from those stated above.

Enter Investment Election Percentages

Select how you wish to enter election percentages:

☒ I want to enter election percentages one time to be applied to all sources. ☐ I want to enter election percentages individually by source type.

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.

Employer: Profit Sharing	☒ Include
> Deferral: Pre-tax	☐ Include
> Employer Match	☐ Include
> Deferral: Roth	☐ Include
> Employer: Safe Harbor Match	☐ Include



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**.

Change Investment Elections

Print

Overall Progress: 20% Complete

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⁽¹⁾ The cutoff time for ETF transaction instructions is 1:00 p.m. CST.

⁽²⁾ If Marketwide Circuit Breaker rules are in effect, cutoff times may differ from those stated above.

Transferable Balances

Would you like to transfer the available money in your account to conform with the percentages you entered for your investment elections? By selecting Yes, this will create a transfer of the existing money in your account.

☒ No ☐ Yes

CANCEL

BACK

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

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**.

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

Click **Submit**.

Overall Progress: **80% Complete**

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⁽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%

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

Go to: <https://www.retirementplanconsultants.info/login>
Contact RPC at 877-800-1114 for login assistance.