

Update Investment Elections

To manage your investments or contributions, choose Manage Investments from the Manage My Account menu. From here you can update your future investment elections by selecting **Rebalance**, you can **Move Money** which allows you to move specific funds or a portion of a fund into another fund(s), or you can, **Update Elections**, which allows you to update the funds where your contributions are allocated.

Update Elections

1. Select Change Elections from Manage Investments menu.

The screenshot shows the 'Manage Investments' dashboard. At the top left, it says 'Manage Investments' with a 'Print' icon. Below this, 'Your Balance' is displayed as '\$127,438.24' and 'Vested Balance' as '\$127,438.24'. To the right, 'Overall Performance' is shown as '1.57%' with a green upward arrow and a note: 'This is your monthly total personal rate of return computed as of 11/30/2018'. At the bottom, there are four action buttons: 'Change Elections' (with a checkmark icon), 'Move Money' (with a dollar sign and arrows icon), 'Rebalance' (with a green bar chart icon), and 'Change Contributions' (with a percentage and circular arrow icon). Each button has a brief description of its function.

2. Enter the percentages in the fields beside the desired funds.

3. Elect whether you would also like to have your current funds (money already in the account) moved to match your new election. Selecting Yes will generate a transfer of your existing money as well as update the future allocations. Selecting No will result in no change to the existing balances.

The screenshot shows the 'Change Elections' form. At the top, it says 'Change Elections' with a checkmark icon and a 'Print' icon. Below this, a progress bar indicates 'Overall Progress: 20% Complete'. The main section is titled 'Transferable Balances' and contains the question: 'Would you like to rebalance your transferable balances in your plan to conform with the percentages you entered for your investment elections?'. There are two radio button options: 'No' (which is selected) and 'Yes'. At the bottom, there are three buttons: 'CANCEL', 'BACK', and 'NEXT'.

4. Click **next** and follow the steps to complete the transaction. Once you submit the request you will receive a 6-digit confirmation number letting you know you have completed the transaction.
