

# Recurring Rebalance

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 [Change Elections](#), you can [Move Money](#) which allows you to move specific funds or a portion of a fund into another fund(s), or you can [Rebalance](#) your entire account by realigning your fund percentages.

## REBALANCE

1. Select **Rebalance** from **Manage Investments** menu.

The screenshot shows the 'Manage Investments' page. At the top right is a 'Print' icon. Below the title, it displays 'Your Balance' as '\$129,851.77' and 'Vested Balance \$129,851.77'. There are four main 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 highlighted in yellow), and 'Change Contributions' (with a percentage and circular arrow icon). Each button has a brief description below it.

2. Select the type of rebalance you would like to process on your account: Click **Make Changes**

The screenshot shows the 'Rebalance' selection screen. At the top is a navigation bar with links: 'My Plan Dashboard', 'View Investments', 'Manage My Account', 'Plan Statements, Reports & Forms', 'Tools & Education', and 'Contact Us'. Below the title 'Rebalance', there are three columns, each with an icon, a title, a description, and a 'MAKE CHANGES' button. The first column is 'Recurring Rebalance' with a circular arrow icon, describing a recurring transaction to match future election percentages. The second is 'Conform Ending Balance' with a green bar chart icon, describing realignment to match future election percentages. The third is 'Conform To Target' with a target icon and a dollar sign, describing realignment to match specified target percentages.

If you would like to have your account balance reset back to the elections automatically throughout

the year, **Recurring Rebalance** is the option you will need to select.

You can also **Conform to Target** to update your fund elections to new percentages, or select **Conform Ending Balance** to have your rebalance occur on demand.

**Recurring Rebalance:**

3. Set your preferences for frequency and date on which you would like the rebalance to occur.

***Please note** - you will not make any election changes during this transaction.*

4. **Enter** the threshold percentage for the rebalance. This will rebalance the total balance that is above the set percentage. The default percentage is 0% and this will ensure the entire account rebalances. If you do not want all funds to rebalance update the percentage to your desired amount.

5. 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.

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