

Pipe Trades Pension of Montana

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PARTICIPANT ELECTION FORM

Printed Name: _____ SS#: _____ DOB: _____

A COMPLETE Election form must be received at the above address by the 15th of the month to be applied the first of the following month. Investment changes and elections are completed no more frequently than once per month. I hereby elect the following percentage allocation of my investment options in the Pipe Trades Pension of Montana:

*****NOTE: MUST BE WHOLE PERCENTAGE, 1% OR MORE IN ANY ONE FUND*****

DO IT MYSELF: Custom Mix		DO IT FOR ME: Target Date Funds	
What it is: Mix and match from a menu of investment options with full customization. Who is it for: Experienced investors who prefer to choose their own investments can choose from the following options. Your choices: see below		What it is: A single "lifetime" fund option lets the "Pros" do it. Who is it for: Pick a fund that targets your projected retirement date and let the Professionals pick the underlying funds to prepare you for retirement.	
Short-Term Fixed Income		Target Date/Asset Allocation/Balanced	
Vanguard Prime Money Market Fund – 120	_____ %		
Fixed Income		TRP Retirement Balanced Fund - 106 _____ %	
Vanguard Total Bond Market Index Fund - 117	_____ %	TRP Retirement 2015 Fund - 107 _____ %	
PIMCO Real Return Fund – 119	_____ %	TRP Retirement 2020 Fund - 108 _____ %	
Metropolitan W Total Return Bond I - 125	_____ %	TRP Retirement 2025 Fund - 109 _____ %	
US Equity		TRP Retirement 2030 Fund - 110 _____ %	
Vanguard Total Stock Market Index Fund - 122	_____ %	TRP Retirement 2035 Fund - 111 _____ %	
Vanguard Equity-Income Adm – 123	_____ %	TRP Retirement 2040 Fund - 112 _____ %	
Vanguard Extended Market Idx I - 124	_____ %	TRP Retirement 2045 Fund - 113 _____ %	
International Equity		TRP Retirement 2050 Fund - 114 _____ %	
Vanguard Intl Stock Fund (Adm) - 121	_____ %	TRP Retirement 2055 Fund - 115 _____ %	
Am Funds EuroPacific Growth Fund – 105	_____ %		
Balanced		Choose the fund year closest to the year you will reach Age 60.	
*See Target Date/Asset Allocation Funds			
TOTAL OF ALL ELECTIONS COMBINED MUST EQUAL 100%		_____ %	

This election is applicable to my current balance, as well as future contributions.

This election is applicable to future contributions only. My current investment balance will not be affected.

Signature: _____ Date: _____

Complete Address: _____

Phone number: _____ Email: _____