

# **Investment Transactions**

For any investment-related transaction, click on the '**My Account**' menu from your participant portal home page. Click on the '**Investments**' sub-menu. Select the '**Make Changes**' tab, and click the select button under '**Choose Investments**'.

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HOME MY ACCOUNT	PLANNING LIBRARY MY PROFIL	ε	
Summary Contributions Research Make Changes What changes do yo Choose an option below to get	bu want to make to your invest	drawals	
Realign My Account Change my current and/or future mix of investments Select	Transfer Investments Transfer from a single investment into different investment(s) Select	Future Elections Only change how my future payroll contributions are invested Select	Did You Know? In one of your investments is outperforming mother, it changes howyour account is allocated. Realigning, ereblanding, your investments resets things back to your origend choices.
Back			Tips and Tricks Important points to consider when managing your investments.

## With multiple transaction types, defining your goal will help you determine which to use.



### A Complete Overhaul Select: Realign My Account

Realignment moves your entire account balance to the new investments you choose, and future contributions can be invested in the same manner.

- To change how your current and/ or future contributions are invested, select 'Realign My Account'. Choose one of these available options:
- Current and Future: Realigns your current investments and changes how future contributions will be invested. This moves your entire account balance to the new investments that you choose, and future contributions will be invested in the same manner.
- Current Balance Only: Realigns only your current balance to the new chosen investments. Future contributions continue being invested based on your existing election.
- Future Contributions Only: Changes only how future contributions to your account are invested. Your existing balance will not be changed or realigned.
- 2. After selecting one of these options, change the percentage to be invested in each individual fund by using the +/- scroll wheel, or by typing in the percentage. Any individual fund may be allocated from 1-100%, however, the total combined amount must equal 100%. When finished, click 'Change Elections'.
- 3. Click '**Confirm**' on the confirmation window to complete the realignment.



Future contributions continue being invested based on your existing election.

- 1. To move money from one individual fund to one or more different funds, select '**Transfer Investments**'.
- 2. On the left side of the fund name, click the bubble of the fund you would like to move money out of, then click continue.
- 3. Under the heading '**type**' choose whether you would like to transfer a percentage of the fund, or a specific dollar amount. Percentages can be done in 1% increments from 1-100%. Dollar amount can be done in \$0.01 increments. After choosing the amount, click '**continue**'.
- 4. Choose where you would like the investment to be transferred to. Use the +/- scroll wheel, or type in the percentage. Any individual fund may be allocated from 1-100%, however, the total combined amount must equal 100%. When finished, click 'Change Elections'.
- 5. Click '**Confirm**' on the confirmation window to complete the transfer.

**Note:** All transactions occur after close of the New York Stock Exchange. Transactions submitted after that time are held until the next trade date. A transaction is not complete without a confirmation number. Be sure to complete the entire process and receive your confirmation number.



### Start New Investment Select: Future Elections

Change only how future contributions to your account are invested. Your existing balance will not be changed or realigned.

- 1. To change how future contributions are invested, select '**Future Elections**'. Change the percentage you would like to be invested in each individual fund by using the +/- scroll wheel, or by typing in the percentage. Any individual fund may be allocated from 1-100%, however, the total combined amount must equal 100%. When finished, click '**Change Elections**'.
- 2. Click '**Confirm**' on the confirmation window to complete the future election change.

HOME	MY ACCOUNT	PLANNING	LIBRARY	MY PROFILE	
Sumn	nary Contribution	s Investments	Rollovers	Loans Withdra	iwals
Research M	lake Changes				
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You	r Plan's Invest	ments			
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#### **Research Investment Options**

Under the '**Research**' tab in the Investments sub-menu, click the '+' to the left of the fund name to see investment performance.

View fund fact sheets by selecting the blue '**F**' icon, or view fund prospectus by selecting the green '**P**' icon.