



Change Investment of Trustee-Directed Assets

Use this form to select a new investment direction for your Trustee Directed Assets. Please note that BPAS will make all requested changes as soon as administratively possible upon receipt.

Plan Name:

BPAS Plan Number:

☐ Change All Assets in the Plan

☐ Change Sources in the Plan indicated below:
Source:
Source:
Source:

☐ Liquidate prior investments and invest dollars according to the new percentages listed below. Please note that if you wish to add new investments to your Plan, you must complete a BPAS Fund Form. To access that form, visit toolbox.bpas.com or contact your BPAS Representative.

Investment Name and Share Class	Ticker	Percentage

By submitting this form, I certify that our organization has fiduciary authority and/or the plan sponsor’s consent to make the changes requested above.

Authorized by (signature)

Date

Print Name

Print Title

Email address

Phone

BPAS Approval (Sales Associate)

Date

Fax completed form to BPAS Sales at 315-266-1287

