

Investment Election Form

United Methodist Personal Investment Plan (UMPIP), Clergy Retirement Security Program Defined Contribution (CRSP DC), Retirement Plan for General Agencies (RPGA) and Horizon 401(k) Plan (Horizon)

Part 1 – Participant Information

Name _____ Social Security # _____
Address _____ Primary phone # () _____
_____ E-mail address _____
Country of citizenship _____

Part 2 – LifeStage Investment Management Election

LifeStage Investment Management, offered by Wespath Benefits and Investments (Wespath), is an investment management service that determines your investment fund allocation based on your age, your Wespath account balances, expected Social Security benefits (if applicable) and the answers to your LifeStage Personal Investment Profile. You may complete your own investment profile in Part 3 or you may use the LifeStage Investment Management default investment profile. Please refer to the *Understanding Your Investment Options* brochure for more information.

You may discontinue using LifeStage Investment Management and choose among Wespath investment funds at any time; however, you may be subject to a 60-day waiting period in accordance with Wespath's policy on interfund transfers. Please refer to the *Understanding Your Investment Options* brochure for more information.

If you are participating in LifeStage Retirement Income and elect to choose your own investment funds below, your LifeStage Retirement Income participation will be cancelled. You will receive a confirmation notice that explains how to manage your future monthly payments.

- I elect **LifeStage Investment Management** to manage my defined contribution accounts, including UMPIP, CRSP DC, RPGA and/or Horizon account balance(s). I understand that while this election is in effect, the service will choose investment funds for me. If desired, complete the LifeStage Personal Investment Profile in Part 3. (**SKIP Part 4 and sign and date the form in Part 5.**)
- I elect to choose the investment funds for my UMPIP, CRSP DC, RPGA and/or Horizon account balances. I understand I must make an investment fund election for these accounts or my account balances will be invested by LifeStage Investment Management. (Complete Parts 4 and 5.)

(over)

Part 3 – LifeStage Personal Investment Profile

To make the selections for your profile, please answer the following questions. Questions 3 and 4 apply only to clergy participants in the Ministerial Pension Plan (MPP). You may change these variables as often as you wish. For more information regarding these selections, please refer to the *Understanding Your Investment Options* brochure.

1. My risk tolerance is: Conservative Moderate (default) Aggressive
Definitions available at wespath.org/risktolerance.
2. I will qualify to receive Social Security benefits when I retire: Yes (default) No
3. I anticipate beginning to receive monthly benefit payments on the following date:
_____ (enter Expected Benefits Commencement Date)
The default setting is the date on which you reach your Social Security Normal Retirement Age.
4. My intention for the non-annuitized portion of MPP is:
 Invest my non-annuitized MPP account balance to support my long-term retirement needs (default)
 Withdraw and spend my non-annuitized MPP account balance soon after retirement

DO NOT COMPLETE THIS SECTION IF YOU ELECTED LIFESTAGE INVESTMENT MANAGEMENT IN PART 2.

Part 4 – Investment Election

You must make an investment fund election for future contributions in order to direct the investment of your defined contribution accounts (includes UMPIP, CRSP DC, RPGA and Horizon). You may make an election to rebalance the investment of your current account balance and/or to direct the investment of future contributions into your account(s). Enter your investment election in 1% increments. Information on the investment funds can be found on Wespath’s website at wespath.org or in the *Understanding Your Investment Options* brochure.

Funds	Election for Current Account Balance ¹	Election for Future Contributions ²
Stable Value Fund	%	%
Inflation Protection Fund	%	%
Fixed Income Fund	%	%
Extended Term Fixed Income Fund	%	%
Multiple Asset Fund	%	%
U.S. Equity Fund	%	%
Equity Social Values Plus Fund	%	%
International Equity Fund	%	%
Total	100 %	100 %

¹ An **Election for Current Account Balance** is an account realignment that rebalances your entire existing fund portfolio.

² An **Election for Future Contributions** specifies the investment funds in which your future contributions (contributions not yet made to your account) are to be invested.
IF YOU HAVE NO ELECTION FOR FUTURE CONTRIBUTIONS ON FILE, YOUR ACCOUNTS WILL BE MANAGED BY LIFESTAGE INVESTMENT MANAGEMENT.

Part 5 – Signature

Please consider an investment’s objectives, risks and expenses carefully before making your selection. This and other important information can be found in the *Understanding Your Investment Options* brochure and in the *Investment Funds Description*. Both publications are available on the Wespath website at wespath.org under “**Investments**”—click “**Resources**” in the drop-down menu then select “**Information.**”

I understand and accept the actions I have taken with this election form.

Signature _____ Date _____

Please complete this form and send it by:

- E-mail (scanned copy) to prcwebteam@wespath.org or
- Fax to **1-847-866-5195** or
- Mail to Wespath Benefits and Investments, 1901 Chestnut Avenue, Glenview, IL 60025