

**Change Form**  
**Stoll Stoll Berne Lokting & Shlachter P.C. Profit Sharing Plan**

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Name: \_\_\_\_\_ Effective date: \_\_\_\_\_

*This form may be used no more than quarterly to change contribution amounts, change fund choices or to re-allocate existing investment funds. Effective dates for any changes may take place on or about January 1<sup>st</sup>, April 1<sup>st</sup>, July 1<sup>st</sup> or October 1<sup>st</sup>. You may revoke these elections at any time.*

**Traditional Salary Deferrals (pre-tax contributions):**

I would like to change the amount of the deduction from my paycheck to \_\_\_\_\_% or \$\_\_\_\_\_.

I would like to keep the amount of the deduction from my paycheck the same.

**Roth Salary Deferrals (after-tax contributions):**

I would like to change the amount of the deduction from my paycheck to \_\_\_\_\_% or \$\_\_\_\_\_.

I would like to keep the amount of the deduction from my paycheck the same.

*Please note the combined annual limit in 2016 for the above deferrals is \$18,000 for those aged under 50 years, and \$24,000 for those aged 50 and above.*

**Fund Choices:**

Please choose one or more of the following funds. Please complete the percentage amount you would like to invest for each fund or account chosen. The total must equal 100%.

**Frank Russell Funds**

\_\_\_\_\_ %     **Frank Russell Lifepoints Equity Growth Strategy Fund (RELRX)**

\_\_\_\_\_ %     **Frank Russell Lifepoints Growth Strategy Fund (RALRX)**

\_\_\_\_\_ %     **Frank Russell Lifepoints Balanced Strategy Fund (RBLRX)**

\_\_\_\_\_ %     **Frank Russell Lifepoints Moderate Strategy Fund (RMLRX)**

\_\_\_\_\_ %     **Frank Russell Lifepoints Conservative Strategy Fund (RCLR)**

**Vanguard Funds**

\_\_\_\_\_ %      **Vanguard Total World Stock Index (VTWSX)**

\_\_\_\_\_ %      **Vanguard Total Stock Market Index (VTSAX)**

\_\_\_\_\_ %      **Vanguard LifeStrategy Growth (VASGX)**

\_\_\_\_\_ %      **Vanguard LifeStrategy Moderate Growth (VSMGX)**

\_\_\_\_\_ %      **Vanguard Prime Money Market Portfolio (VMMXX)**

**Other Funds**

\_\_\_\_\_ %      **American Century Short Term Government Fund (TWUSX)**

**Check one of the following boxes:**

I want the above choices to apply only to future deductions from my paycheck.

I want to re-allocate only my existing investments as set forth above.

I want the above choices to apply to future deductions from my paycheck, and I also want to re-allocate my existing investments as set forth above.

(We strongly encourage you to seek independent advice from a financial advisor before changing your current allocation.)

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I hereby certify that I have received a Prospectus and/or other information about the funds I have chosen, and I have read and understood the Profit Sharing Plan policies and procedures.

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_