

**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 2019 for the above deferrals is \$19,000 for those aged under 50 years, and \$25,000 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%.

\_\_\_\_\_ % **Vanguard Treasury Money Market Investor (VUSXX) – Money Market-Taxable**

\_\_\_\_\_ % **Vanguard Short-Term Investment Grade Adm (VFSUX) – Short-Term Bond**

\_\_\_\_\_ % **Dodge & Cox Income (DODIX) – Intermediate-Term Bond**

\_\_\_\_\_ % **Vanguard Total Bond Market Index Adm (VBTLX) – Intermediate-Term Bond**

\_\_\_\_\_ % **Osterweis Strategic Income (OSTIX) – High Yield Bond**

\_\_\_\_\_ % **JPMorgan Strategic Income Opports R5 (JSORX) - Nontraditional Bond**

\_\_\_\_\_ % **Dodge & Cox Stock (DODGX) – Large Value**

_____%	<b>Vanguard Value Index Adm (VVIAX) – Large Value</b>
_____%	<b>DFA US Core Equity 1 I (DFEOX) – Large Blend</b>
_____%	<b>DFA US Sustainability Core (DFSIX) – Large Blend</b>
_____%	<b>Vanguard Total Stock Market Index (VTSAX)</b>
_____%	<b>Vanguard Growth Index Admiral (VIGAX) – Large Growth</b>
_____%	<b>Polen Growth Institutional (POLIX) – Large Growth</b>
_____%	<b>Vanguard Mid Cap Index Admiral (VIMAX) – Mid-Cap Blend</b>
_____%	<b>DFA US Small Cap I (DFSTX) – Small Blend</b>
_____%	<b>Vanguard Real Estate Index Admiral (VGSLX) – Real Estate</b>
_____%	<b>Vanguard Total World Stock Index (VTWSX)</b>
_____%	<b>DFA International Core Equity I (DFIEX) – Foreign Large Blend</b>
_____%	<b>JOHCM International Select I (JOHIX) – Foreign Large Growth</b>
_____%	<b>IVA International I (IVIQX) – Foreign Small/Mid Blend</b>
_____%	<b>Seafarer Overseas Gr and Income Instl (SIGIX) – Diversified Emerging Markets</b>
_____%	<b>Vanguard Emerging Markets Stock Idx Adm (VEMAX) -Diversified Emerging Mkts</b>
_____%	<b>Vanguard Balanced Index Inv (VBIAX) – 50%-70% Equity</b>
_____%	<b>Vanguard Target Retirement Income Inv (VTINX) – Target Date Retirement</b>
_____%	<b>Vanguard LifeStrategy Moderate Growth (VSMGX)</b>
_____%	<b>Vanguard LifeStrategy Growth (VASGX)</b>
_____%	<b>Vanguard Target Retirement 2020 (VTWNX) – Target Date 2020</b>
_____%	<b>Vanguard Target Retirement 2025 (VTTVX) – Target Date 2025</b>

- \_\_\_\_\_ % **Vanguard Target Retirement 2030 (VTHR) – Target Date 2030**
- \_\_\_\_\_ % **Vanguard Target Retirement 2035 (VTTH) – Target Date 2035**
- \_\_\_\_\_ % **Vanguard Target Retirement 2040 (VFOR) – Target Date 2040**
- \_\_\_\_\_ % **Vanguard Target Retirement 2045 (VTIV) – Target Date 2045**
- \_\_\_\_\_ % **Vanguard Target Retirement 2050 (VFIF) – Target Date 2050**
- \_\_\_\_\_ % **Vanguard Target Retirement 2055 (VFFV) – Target Date 2055**
- \_\_\_\_\_ % **Vanguard Target Retirement 2060 (VTTS) – Target Date 2060**

**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: \_\_\_\_\_