

Retirement Plan Investment Deferral Allocation

Employer Name:

Employee Information:

First Name

M.I.

Last Name

Social Security Number

Investment Options: Your Retirement Plan allows you to choose how your retirement plan dollars will be invested. You may select your investments in one of two ways. You can select one of the created portfolios below by checking the appropriate box, or you can create a custom portfolio using the available options on the reverse side. If no election is made, all deferrals will go into the Hartford Balanced Income Fund (HBLAX).

Pre-Selected Portfolios

I would like to reallocate my current account holdings also

Very Conservative

100% Bond Sample Portfolio

30% Thompson Bond (THOPX)
25% Loomis Sayles Investment Grade Bond (LIGRX)
25% Artisan High Income Investor (ARTFX)
20% T. Rowe Price Global Bond (PRSNX)

Conservative

80% Bond 20% Stock Sample Portfolio

20% T. Rowe Price Global Bond (PRSNX)
20% Artisan High Income Investor (ARTFX)
20% Thompson Bond (THOPX)
20% Loomis Sayles Investment Grade Bond (LIGRX)
15% First Eagle Global (SGENX)
5% T Rowe Price Dividend Growth (PRDGX)

Moderate

60% Bond 40% Stock Sample Portfolio

20% T Rowe Price Div Growth (PRDGX)
15% T. Rowe Price Global Bond (PRSNX)
15% Artisan High Income Investor (ARTFX)
15% Loomis Sayles Investment Grade Bond (LIGRX)
10% Thompson Bond (THOPX)
10% ClearBridge Select Fund Class I (LBFIX)
10% Hood River Small Cap Growth Fund (HRSRX)
5% MFS Intl Diversification (MDIDX)

Growth

40% Bond 60% Stock Sample Portfolio

15% T Rowe Price Div Growth (PRDGX)
15% T. Rowe Price Global Bond (PRSNX)
10% ClearBridge Select Fund Class I (LBFIX)
10% Artisan High Income Investor (ARTFX)
10% Hood River Small Cap Growth Fund (HRSRX)
10% Thompson Bond (THOPX)
10% Driehaus Emerging Markets Growth (DREGX)
10% MFS International Diversification (MDIDX)
5% Brown Capital Mgmt Int'l Small Co (BCSVX)
5% Loomis Sayles Investment Grade Bond (LIGRX)

Aggressive

20% Bond 80% Stock Sample Portfolio

15% T Rowe Price Div Growth (PRDGX)
15% Hood River Small Cap Growth Fund (HRSRX)
15% ClearBridge Select Fund Class I (LBFIX)
10% MFS Intl Diversification (MDIDX)
10% Madison Dividend Income (BHBFX)
10% Brown Capital Mgmt Intl Sm Co (BCSVX)
10% Artisan High Income (ARTFX)
10% T. Rowe Price Global Multi-Sector Bond (PRSNX)
5% Driehaus Emerging Markets Growth (DREGX)

Very Aggressive

100% Stock Sample Portfolio

25% T Rowe Price Div Growth (PRDGX)
20% Hood River Small Cap Growth Fund (HRSRX)
15% ClearBridge Select Fund Class I (LBFIX)
10% Madison Dividend Income (BHBFX)
10% MFS International Diversification (MDIDX)
10% Brown Capital Mgmt Int'l Small Co (BCSVX)
10% Driehaus Emerging Markets Growth (DREGX)

Employee Signature: _____

Date _____

Please consider an investment's objectives, risks, charges and expenses carefully before making a selection. This and other important information is contained in each Fund's prospectus and summary prospectus which can be obtained free of charge by calling the fund company or RFM Financial Solutions at 989-772-1209. Please read the prospectus carefully before investing.

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Employee Information:

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M.I.

Last Name

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Social Security Number

Investment Options: Your Retirement Plan allows you to choose how your retirement plan dollars will be invested. You may select your investments two ways. You can select one of the created portfolios on the reverse side by checking the appropriate box, or you can create a custom portfolio by dividing the total amount invested among the available options below, but the percentages allocated to each investment must total 100%. If no election is made, all deferrals will go into the Hartford Balanced Income Fund (HBLAX).

Investment Election

I would like to reallocate my current account holdings also

Hartford Balanced Income (HBLAX)	_____ %	DWS Small Cap Core Fund Class S (SSLCX)	_____ %
Wells Fargo Diversified Cap Bldr (EKBAX)	_____ %	MFS International Diversification (MDIDX)	_____ %
Fidelity Advisor Balanced A (FABLX)	_____ %	Fidelity Advisor Intl Small Cap (FIASX)	_____ %
First Eagle Global (SGENX)	_____ %	Brown Capital Mgmt Intl Sm Co (BCSVX)	_____ %
T Rowe Price Dividend Growth (PRDGX)	_____ %	Driehaus Emerging Markets (DREGX)	_____ %
Madison Dividend Income (BHBFX)	_____ %	Thompson Bond (THOPX)	_____ %
ClearBridge Select Fund Class I (LBFIX)	_____ %		
Wells Fargo Special Mid Cap Value (WFMDX)	_____ %	Loomis Sayles Inv Grade Bond (LIGRX)	_____ %
William Blair Small Cap Growth (WBSNX)	_____ %	Artisan High Income Investor (ARTFX)	_____ %
Hood River Small Cap Growth Fund (HRSRX)	_____ %	T. Rowe Price Global Bond (PRSNX)	_____ %
		Eaton Vance Emerging Markets (EADOX)	_____ %

PERCENTAGES MUST TOTAL 100%

Employee Signature: _____ **Date** _____

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