



## IMPORTANT INFORMATION

- Requests received by 12:00 p.m. CT will be processed the same day. Requests received after 12:00 p.m. are generally processed the next business day. Incomplete forms may result in processing delays.
- Access your 403(b) retirement account online at [www.agfinancial.org](http://www.agfinancial.org). Online changes completed before 3:00 p.m. CT on trading days will be processed the same day. All other changes are generally processed the next trading day.
- Changes are available for online viewing the next business day after processing.

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## PARTICIPANT INFORMATION

Full Legal Name

Date of Birth

Social Security Number

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## PLAN INFORMATION

*Select all that apply.*

- |   |  |
|---|--|
| <input type="checkbox"/> All of my retirement accounts with AGFinancial               | <input type="checkbox"/> Pre-2005 Deferred Compensation ( <i>Rabbi Trust</i> ) |
| <input type="checkbox"/> 403(b)   | <input type="checkbox"/> 409A Deferred Compensation                            |
| <input type="checkbox"/> Employer Plan ( <i>AGFinancial serves as administrator</i> ) |  |

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## CONTRIBUTION TYPE

*Select one.*

- |  |  |
|--|--|
| <input type="checkbox"/> All contribution types      | <input type="checkbox"/> Rollover/Transfer         |
| <input type="checkbox"/> Employer Contributions      | <input type="checkbox"/> Employee Pre-tax Deferral |
| <input type="checkbox"/> Employee Roth Contributions | <input type="checkbox"/> After-tax Contributions   |

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## RETIREMENT INVESTMENT ELECTIONS

*Select one track and if applicable, select a strategy within that track. Investment elections must be in increments of 1%. Contributions are posted three times a week and invested according to your most recent election on file. If no selection is indicated, the default investment is the MBA Income Fund. If the total allocation does not equal 100%, the remainder will be allocated to the MBA Income Fund. Fund prospectuses/descriptors are available at [www.agfinancial.org/retirement](http://www.agfinancial.org/retirement). Investment options continued on next page.*

☐ **TRACK 1: MBA INCOME FUND**

The MBA Income Fund pays a fixed rate that is declared quarterly with interest compounding monthly. Its primary investments consist of loans to churches.

☐ **TRACK 2: INDIVIDUAL INVESTMENTS**

This track allows you to customize the allocation within your portfolio.

- |  |              |
|--|--------------|
| <input type="checkbox"/> MBA Income Fund (100% Fixed)                            | _____ %      |
| <input type="checkbox"/> Steward Select Bond Fund (100% Bonds)                   | _____ %      |
| <input type="checkbox"/> Steward Global Equity Income Fund (100% Stocks)         | _____ %      |
| <input type="checkbox"/> Steward Covered Call Income Fund (100% Stocks)          | _____ %      |
| <input type="checkbox"/> Steward Large Cap Enhanced Index Fund (100% Stocks)     | _____ %      |
| <input type="checkbox"/> Steward International Enhanced Index Fund (100% Stocks) | _____ %      |
| <input type="checkbox"/> Steward Small-Mid Cap Enhanced Index Fund (100% Stocks) | _____ %      |
| <input type="checkbox"/> Steward Diversified Equity Strategy (100% Stocks)       | _____ %      |
| <b>TOTAL</b>   | <b>100 %</b> |

# RETIREMENT INVESTMENT CHANGE FORM

(continued from previous page)

## ☐ TRACK 3: TARGET-DATE STRATEGIES

These pre-mixed strategies create a diversified portfolio based on your retirement target date. These fully-screened strategies automatically become more conservative as the target date approaches.

- ☐ Steward 2020 Strategy
- ☐ Steward 2030 Strategy
- ☐ Steward 2040 Strategy
- ☐ Steward 2050 Strategy

## ☐ TRACK 4: RISK-BASED STRATEGIES

These pre-mixed strategies create a diversified portfolio based on your risk tolerance level. Steward strategies offer a fully-screened enhanced index investment approach. Russell strategies offer a non-screened active manager investment approach.

- ☐ Steward Conservative Strategy (20% Stocks/80% Bonds)
- ☐ Steward Moderate Strategy (40% Stocks/60% Bonds)
- ☐ Steward Balanced Strategy (60% Stocks/40% Bonds)
- ☐ Steward Aggressive Growth Strategy (80% Stocks/20% Bonds)
- ☐ Steward Diversified Equity Strategy (100% Stocks)
- ☐ Russell LifePoints® Moderate Strategy Fund (40% Stocks/60% Bonds)
- ☐ Russell LifePoints® Balanced Strategy Fund (60% Stocks/40% Bonds)
- ☐ Russell LifePoints® Growth Strategy Fund (80% Stocks/20% Bonds)
- ☐ Russell LifePoints® Equity Growth Strategy Fund (100% Stocks)

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## SIGNATURE

I hereby request the investment changes made above, and understand that my investments will be allocated as elected until such time as I make any future changes.

### APPLY INVESTMENT CHANGES

- ☐ All contributions (*both future contributions and current balances*)
- ☐ Future contributions only
- ☐ Existing balance only

Participant Signature

Printed Name

Date