



## 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 I – Participant Information

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

Address \_\_\_\_\_ Primary phone # (\_\_\_\_) \_\_\_\_\_

\_\_\_\_\_ E-mail address \_\_\_\_\_

Country of citizenship \_\_\_\_\_

### Part 2 – LifeStage Investment Management Service Election

The LifeStage Investment Management Service, offered by the General Board of Pension and Health Benefits (General Board), is an investment management tool that determines your investment fund allocation based on your age, your General Board 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 Service default investment profile. Please refer to the brochure *General Board Investing Opportunities* for more information.

You may discontinue using the LifeStage Investment Management Service and choose among the General Board investment funds at any time; however, you may be subject to a 60-day waiting period in accordance with the General Board’s policy on interfund transfers.

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 montly payments.

- I elect the **LifeStage Investment Management Service** 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 the LifeStage Investment Management Service. (**Complete Parts 4 and 5.**)

### 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 *General Board Investing Opportunities* brochure.

1. My risk tolerance is:  Conservative       Moderate       Aggressive  
(The default setting is Moderate.)
2. I will qualify to receive Social Security benefits when I retire:  Yes       No  
(The default setting is Yes.)
3. I anticipate beginning to receive monthly benefit payments at age: \_\_\_\_\_ (enter age)  
(The default setting is Social Security Normal Retirement Age.)
4. I intend to annuitize \_\_\_\_\_ % of my MPP account at retirement. (At least 65% must be annuitized. The default percentage is 65%.)

**Part 4 – Investment Election. DO NOT COMPLETE THIS SECTION IF YOU ELECTED LIFESTAGE IN PART 2.**

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; the total must equal 100%. If not, your election is invalid and the General Board will return the form to you for proper completion. Information on the investment funds can be found on the General Board’s website at [www.gbophb.org](http://www.gbophb.org) or in the *General Board Investing Opportunities* brochure.

	<b>Election for Current Account Balance<sup>1</sup></b>	<b>Election for Future Contributions<sup>2</sup></b>
Stable Value Fund	_____ %	_____ %
Inflation Protection Fund	_____ %	_____ %
Fixed Income Fund	_____ %	_____ %
Multiple Asset Fund	_____ %	_____ %
Balanced Social Values Plus Fund	_____ %	_____ %
U.S. Equity Fund	_____ %	_____ %
International Equity Fund	_____ %	_____ %
<b>Total</b>	_____ %	_____ %

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

<sup>2</sup> 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 ON FILE, YOUR ACCOUNTS WILL BE MANAGED BY LIFESTAGE.**

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**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 *General Board Investing Opportunities* brochure and on the General Board website at [www.gbophb.org](http://www.gbophb.org) under “Socially Responsible Investing & Funds.”

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please mail this completed form to the General Board of Pension and Health Benefits,  
1901 Chestnut Avenue, Glenview, Illinois 60025-1604. Be sure to keep a copy for your records.  
Or you may fax it to **1-847-866-5195**.