

Enrollment & Investment Update Form

| First Name | MI Last N | ame | Employer Name | |
|--|--|---------------------|---|--|
| Address | | | Day Phone | Social Security No. |
| City | State | Zip Code | Email | |
| I would like to | receive ELECTRONIC statements fro | m Perfect401(k) | | |
| I would like to | receive PAPER statements from Per | fect401(k) | Date of Hire | Date of Birth |
| elect One | Enroll in 401(k) Retirement Pla | n. | Update/ Change My Investm | nent Elections. |
| 1) Option: | I DO NOT Want to Participate i the 401(k) Plan at this time. | n | Transfer Funds from Prior 40 (Attach Completed Rollove | |
| TEP 1: SALARY D | EFERRAL AMOUNT | | | |
| Traditional (pre-tax): Roth (after-tax): | I elect to withhold | % or % or | | sation per pay period on a Pre-Tax Basis sation per pay period on an After-Tax Ba |
| Catch Up Contributions: | If you will be 50 years old as | s of the last day o | f the year, you are entitled to | make additional "Catch-Up" Contributio |
| TEP 2: SELECT O | NE INVESTOR PROFILE O | PTION BELOV | V (A, B or C) | |
| ☐ Investor Pro | file (A) PRO Account – | Perfect401(k |)'s Managed Target-Ri | sk Portfolio |
| Select C | ONE 'PRO Account' from the t | hree options be | low and then proceed to St | tep 3. |
| | | | | |
| ☐ Co | nservative Portfolio | ☐ Moderate | e Portfolio 🔲 A | Aggressive Portfolio |
| | file (B) Customized Cor | | | dingly. Selection must equal 100%. |
| (DFREX) DFA Real Estate | e Sec Portfolio Fund | % | (VFAIX) Vanguard Financials | Index Fund% |
| (SWISX) Schwab International Index Fund | | % | (OGMIX) Oppenheimer Gold | & Precious Minerals% |
| (SWPPX) Schwab S&P 500 Index Fund | | % | (VHCIX) Vanguard Healthcare Index Fund | |
| (SWRSX) Schwab Treasury Inflation-Protected Bond Index | | % | (VIMAX) Vanguard Mid-Cap Ir | ndex Fund% |
| (SWSSX) Schwab Small-Cap Index Fund | | % | (VITAX) Vanguard Info Tech Ir | 0/ |
| (SWTSX) Schwab Total Stock Market Index Fund | | % | (VMIAX) Vanguard Materials | Index Fund% |
| (TILVX) TIAA-CREF Large-Cap Value Index Fund | | % | (VSCSX) Vanguard Short-Tern | n Bond Index Fund% |
| (TILIX) TIAA-CREF Large-Cap Growth Index Fund | | % | (VTWSX) Vanguard Total Wor | rld Stock Index Fund% |
| (VBIAX) Vanguard Balanced Index Fund | | % | (VWEAX) Vanguard High-Yield | d Corp Bond Fund% |
| (VEMAX) Vanguard Eme | erging Markets Stock Index Fund | % | (WFBIX) Blackrock US Total Be | ond Index Fund% |
| | | | | cct (Money Mkt Equiv) |

| ☐ Investor Profile (C) Participant Self-Dire | ected "Brokerage-Window" Account |
|--|---|
| • • • | chwab granting you total discretion over all investment elections, asset allocation and |
| | any trades on your behalf. To open a Participant Choice Retirement Account |
| | w.perfect401k.com/user-central. The account opening wizard will guide you through |
| the setup process. Please contact Wellington or yo | |
| For more information about any of the above investments, please | e ao to an annronriate financial website (Ex: Yahoo® Finance). |
| To more information about any of the above investments, prease | go to an appropriate financial website (Ex. rando Tinance). |
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| STEP 3: SIGN & DATE | |
| | |
| as a salary deferral contribution for my account. I have indicat made on my behalf and any contributions made pursuant to my investment elections above. I further understand that the Consulting Services, Inc. (WCS) and are subject to change at a without notice, and may require WCS to "map" old investmen | my compensation as indicated in Step 1 to be contributed by my employer to the Plan red my investment elections in Step 2. I hereby authorize that any company contributions a salary deferral agreement or other sources under the Plan be invested according to a Target-Risk Portfolios in Investor Profile (A) are actively managed by Wellington any time without notice. Similarly, Plan 'Core' investment options may be changed not to new ones. Participants electing Self-Directed Brokerage Accounts will be required set Fund. Investments in mutual funds are not FDIC insured and may lose value. |
| to maintain a minimain of 2% in the Flair 3 core Money Main | activation. Investments in mutaurianus are not i sie insured and may lose value. |
| | |
| Signature: | Date: |
| | |
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| EMPLOYEES - Submit completed form(s) to your Emp | oloyer <u>EMPLOYERS</u> - Submit form(s) to Everington |
| | |
| | bloyer <u>EMPLOYERS</u> - Submit form(s) to Everington city by phone at (877) 836-1993 or by email at info@perfect401k.com |
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