



YOUR INFORMATION

Form with fields for Social Security Number, Last Name, First Name, Mailing Address, City, State, ZIP, Date of Birth, Date of Hire, and Phone.

HOW DO YOU WANT TO INVEST YOUR CONTRIBUTIONS?

Changes requested on this form are for future contributions only. You may change your investment instructions for current balances and future contributions any time by logging in at standard.com/retirement or calling 800.858.5420. The Standard can help you manage your investments when you select a Guided Portfolio. You may create your own portfolio by completing the Independent section below. If you do not make a selection, your contributions will be invested in the plan's default fund(s). Complete only one subsection, not both.

Option 1: Guided Portfolios — Choose one of the Guided Portfolios below by checking the appropriate box. The allocation for each of these portfolios can be found on the reverse side of this form.

Form with checkboxes for Conservative, Moderately Conservative, Moderate, Moderately Aggressive, and Aggressive.

Option 2: Independent — Select your own combination of investments by entering whole percentages below. Please be sure that your selections total 100 percent. The minimum for any investment is 1 percent.

1. Signifies a scheduled fund termination that will occur in the next 120 days. 2. Redemption fee may apply to short-term investments. 3. A transfer restriction applies to the investment. This restriction may affect your ability to move money between certain investments.

Form with a grid of investment options and a 100% Total label.

AUTOMATIC REBALANCER

Check a box below to select the Automatic Rebalancer service for your account. If you select this service, your account assets will be rebalanced to match your investment directives at the time of rebalancing. Automatic Rebalancer will remain off if you do not make a selection below.

How often would you like your account rebalanced? [ ] Quarterly [ ] Semiannually [ ] Annually

AUTHORIZATION

I authorize my employer and the plan administrator to invest my savings as outlined on this form. I also direct my employer and the plan administrator to implement any other instructions I have provided on this form. I have read the Disclosure Statement on this form and, by signing here, agree to be bound by its terms. The employer, trustees and any others concerned with the administration of the plan are entitled to rely on these instructions; each shall be fully protected in taking or omitting any action under any provisions of the plan in reliance on this information.

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

FOR BOOKKEEPERS ONLY

Please upload this form as you would employee contribution data to the SuperiorUSA Benefits secure portal.

Location Code \_\_\_\_\_ Participant Name \_\_\_\_\_ For questions, Please call 877-529-2477 x33

## GUIDED PORTFOLIO DESCRIPTIONS

	Conservative	Moderately Conservative	Moderate	Moderately Aggressive	Aggressive
<b>Cash Equivalent</b>	<b>30%</b>	<b>20%</b>	<b>15%</b>	<b>5%</b>	<b>0%</b>
Standard Stable Asset A	30%	20%	15%	5%	0%
<b>Bonds</b>	<b>50%</b>	<b>40%</b>	<b>25%</b>	<b>15%</b>	<b>0%</b>
Dodge & Cox Income X	50%	40%	25%	15%	0%
<b>Large-Cap Stocks</b>	<b>11%</b>	<b>23%</b>	<b>34%</b>	<b>45%</b>	<b>56%</b>
Fidelity 500 Index	5%	11%	16%	23%	28%
MFS Growth R6	3%	6%	9%	11%	14%
Vanguard Windsor II Adm	3%	6%	9%	11%	14%
<b>Small-/Mid-Cap Stocks</b>	<b>4%</b>	<b>7%</b>	<b>11%</b>	<b>15%</b>	<b>19%</b>
Vanguard MidCapGrwth Idx Adm	1%	2%	3%	4%	5%
Vanguard Mid Cap Val Idx Adm	1%	2%	3%	4%	5%
Vanguard Sm Cap Grth Idx Adm	2%	3%	5%	7%	9%
<b>International Stocks</b>	<b>5%</b>	<b>10%</b>	<b>15%</b>	<b>20%</b>	<b>25%</b>
American Funds EUPAC R6	5%	10%	15%	20%	25%

## NEXT STEPS

Your employer will forward the completed form to The Standard. This form will override any changes previously made using The Standard's automated phone system or online via Personal Savings Center.

The Standard will deem invalid any Investing Form that is completed incorrectly. Invalid forms include, but are not limited to, those containing: investment elections that do not total 100 percent, fractional investment election percentages, conflicting or contradictory elections, the selection of old investment options no longer available in the plan, illegible, incomplete or unsigned forms. If an Investing Form is deemed to be invalid, any contributions received will be invested in the plan's default fund. The Standard will notify by letter any participant whose investment elections have been defaulted with instructions on how they can make changes to their investments.

For information about redemption fees that may apply to certain funds signified by the second footnote, please contact The Standard at 800.858.5420.

Visit [standard.com/retirement](http://standard.com/retirement) to access Personal Savings Center to manage your account or call a customer service representative at 800.858.5420.

To select the amount you wish to save, please use the Savings Form.

## DISCLOSURE STATEMENT

You must notify The Standard within 15 days of receipt of your quarterly account statement of any errors or if you requested and confirmed an investment transfer or directive change that was not completed during the period covered by the statement. You may give notice by contacting a customer service representative at **800.858.5420** or by emailing [savings@standard.com](mailto:savings@standard.com). Unless you give such notice, The Standard will not be liable for any resulting loss to your account. In any case, The Standard will not be liable if circumstances beyond its control prevent the transaction or if its liability is otherwise limited by regulation or agreement.

The Standard is the marketing name for StanCorp Financial Group, Inc. and its subsidiaries. StanCorp Equities, Inc., member FINRA, wholesales a group annuity contract issued by Standard Insurance Company and a mutual fund trust platform for retirement plans. Third-party administrative services are provided by Standard Retirement Services, Inc. Investment advisory services are provided by StanCorp Investment Advisers, Inc., a registered investment advisor. StanCorp Equities, Inc., Standard Insurance Company, Standard Retirement Services, Inc. and StanCorp Investment Advisers, Inc. are subsidiaries of StanCorp Financial Group, Inc. and all are Oregon corporations.