

Participant Enrollment Governmental 457(b) Plan

ALAMEDA COUNTY 457(B) DEFERRED COMPENSATION PLAN

525127-01

Participant Information	1
Last Name First Name MI	Social Security Number
(The name provided MUST match the name on file with Service Provider.)	
Mailing Address	E-Mail Address
City State ZIP Code	☐ Married ☐ Unmarried ☐ Female ☐ Male
Home Phone Work Phone	Date of Birth (mm/dd/yyyy) Date of Hire (mm/dd/yyyy)
□ Check box if you prefer to receive quarterly account statements in Spanish.	
Payroll Information	
☐ Pretax contributions \$ OR	$^{\prime}$ 0
□ Roth contributions \$ OR	6
The total annual combination of pretax and Roth contributions cannot in the 2024 tax year, whichever is less. My contributions must be specified to the second seco	ot exceed 61% of my gross pay OR \$23,000 of my eligible compensation pecified consistently (as a dollar amount or as a percentage).
Payroll Effective Date:	Payroll Center Name: THE COUNTY OF ALAMEDA Bi-Weekly payroll 001881
	Payroll Center Number: 2 Division Name: Subplan 001881 Division Number: 2
1 7	2

Investment Option Information (applies to all contributions) - Please refer to your communication materials for information regarding each investment option and Asset Allocation Models.

I understand that funds may impose redemption fees on certain transfers, redemptions or exchanges if assets are held less than the period stated in the fund's prospectus or other disclosure documents. I will refer to the fund's prospectus and/or disclosure documents for more information.

Select either an Asset Allocation Model (A) or your own investment options (B).

(A) Asset Allocation Model Selection - only one model can be selected

Asset Allocation Model Name	Model Selection	Asset Allocation Model Name	Model Selection
Advisor GoalMaker AGGRESSIVE 2005		Advisor GoalMaker CONS 2023	
Advisor GoalMaker AGGRESSIVE 2006		Advisor GoalMaker CONS 2024	
Advisor GoalMaker AGGRESSIVE 2007		Advisor GoalMaker CONS 2025	
Advisor GoalMaker AGGRESSIVE 2008		Advisor GoalMaker CONS 2026	
Advisor GoalMaker AGGRESSIVE 2009		Advisor GoalMaker CONS 2027	
Advisor GoalMaker AGGRESSIVE 2010		Advisor GoalMaker CONS 2028	
Advisor GoalMaker AGGRESSIVE 2011		Advisor GoalMaker CONS 2029	

Last Name	First Name	M.I. Social Security Number	<u>525127-01</u> Number
Asset Allocation Model Name	Model Selection	Asset Allocation Model Name	Model Selection
Advisor GoalMaker AGGRESSIVE 2012		Advisor GoalMaker CONS 2030	
Advisor GoalMaker AGGRESSIVE 2013		Advisor GoalMaker CONS 2031	
Advisor GoalMaker AGGRESSIVE 2014		Advisor GoalMaker CONS 2032	
Advisor GoalMaker AGGRESSIVE 2015		Advisor GoalMaker CONS 2033	
Advisor GoalMaker AGGRESSIVE 2016		Advisor GoalMaker CONS 2034	
Advisor GoalMaker AGGRESSIVE 2017		Advisor GoalMaker CONS 2035	
Advisor GoalMaker AGGRESSIVE 2018		Advisor GoalMaker CONS 2036	
Advisor GoalMaker AGGRESSIVE 2019		Advisor GoalMaker CONS 2037	
Advisor GoalMaker AGGRESSIVE 2020		Advisor GoalMaker CONS 2038	
Advisor GoalMaker AGGRESSIVE 2021		Advisor GoalMaker CONS 2039	
Advisor GoalMaker AGGRESSIVE 2022		Advisor GoalMaker CONS 2040	
Advisor GoalMaker AGGRESSIVE 2023		Advisor GoalMaker MODERATE 2005	
Advisor GoalMaker AGGRESSIVE 2024		Advisor GoalMaker MODERATE 2006	
Advisor GoalMaker AGGRESSIVE 2025		Advisor GoalMaker MODERATE 2007	
Advisor GoalMaker AGGRESSIVE 2026		Advisor GoalMaker MODERATE 2008	
Advisor GoalMaker AGGRESSIVE 2027		Advisor GoalMaker MODERATE 2009	
Advisor GoalMaker AGGRESSIVE 2028		Advisor GoalMaker MODERATE 2010	
Advisor GoalMaker AGGRESSIVE 2029		Advisor GoalMaker MODERATE 2011	
Advisor GoalMaker AGGRESSIVE 2030		Advisor GoalMaker MODERATE 2012	
Advisor GoalMaker AGGRESSIVE 2031		Advisor GoalMaker MODERATE 2013	
Advisor GoalMaker AGGRESSIVE 2032		Advisor GoalMaker MODERATE 2014	
Advisor GoalMaker AGGRESSIVE 2033		Advisor GoalMaker MODERATE 2015	
Advisor GoalMaker AGGRESSIVE 2034		Advisor GoalMaker MODERATE 2016	
Advisor GoalMaker AGGRESSIVE 2035		Advisor GoalMaker MODERATE 2017	
Advisor GoalMaker AGGRESSIVE 2036		Advisor GoalMaker MODERATE 2018	
Advisor GoalMaker AGGRESSIVE 2037		Advisor GoalMaker MODERATE 2019	
Advisor GoalMaker AGGRESSIVE 2038		Advisor GoalMaker MODERATE 2020	
Advisor GoalMaker AGGRESSIVE 2039		Advisor GoalMaker MODERATE 2021	
Advisor GoalMaker AGGRESSIVE 2040		Advisor GoalMaker MODERATE 2022	
Advisor GoalMaker CONS 2005		Advisor GoalMaker MODERATE 2023	
Advisor GoalMaker CONS 2006		Advisor GoalMaker MODERATE 2024	
Advisor GoalMaker CONS 2007		Advisor GoalMaker MODERATE 2025	
Advisor GoalMaker CONS 2008		Advisor GoalMaker MODERATE 2026	
Advisor GoalMaker CONS 2009		Advisor GoalMaker MODER ATE 2028	
Advisor GoalMaker CONS 2010	<u> </u>	Advisor GoalMaker MODER ATE 2020	
Advisor GoalMaker CONS 2011 Advisor GoalMaker CONS 2012	٥	Advisor GoalMaker MODERATE 2029 Advisor GoalMaker MODERATE 2030	
Advisor GoalMaker CONS 2012 Advisor GoalMaker CONS 2013	_	Advisor GoalMaker MODERATE 2030 Advisor GoalMaker MODERATE 2031	0
Advisor GoalMaker CONS 2014	_	Advisor GoalMaker MODERATE 2032	
Advisor GoalMaker CONS 2014 Advisor GoalMaker CONS 2015	_	Advisor GoalMaker MODERATE 2032 Advisor GoalMaker MODERATE 2033	
Advisor GoalMaker CONS 2016		Advisor GoalMaker MODERATE 2034	
Advisor GoalMaker CONS 2017	_	Advisor GoalMaker MODERATE 2035	
Advisor GoalMaker CONS 2017 Advisor GoalMaker CONS 2018	٥	Advisor GoalMaker MODERATE 2035 Advisor GoalMaker MODERATE 2036	
Advisor GoalMaker CONS 2019	_	Advisor GoalMaker MODERATE 2030 Advisor GoalMaker MODERATE 2037	
Advisor GoalMaker CONS 2020	_	Advisor GoalMaker MODERATE 2038	
Advisor GoalMaker CONS 2021	_	Advisor GoalMaker MODERATE 2039	
Advisor GoalMaker CONS 2022	0	Advisor GoalMaker MODERATE 2040	_
(B) Select Your Own Investment	t Options		
INVESTMENT (OPTION	INVESTMENT OPTI	ON
NAME			CKER CODE %
State St Gbl AllCp Eq ex-US Idx SL Cl II		Hartford Core Equity R6HAI	
MFS Intnl Growth Equity (IS Platform)		JPMorgan Equity Income R6 OIE	
Fidelity Small Cap Index		Large Cap Growth / Jennison Fund	D0982A
JPMorgan Small Cap Equity R5		Pax Sustainable Allocation Inst	IX PAXIX
Carillon Scout Mid Cap R-6		PIMCO Income InstlPIM	
Fidality Mid Con Indox	ECMDY ECMDY	Core Plus Pond / PCIM Fund N/A	D0050 A

Fidelity 500 Index..... FXAIX

FSMDX

FXAIX

MUST INDICATE WHOLE PERCENTAGES

D0859A

D2101A

= 100%

				525127-01
Last Name	First Name	M.I.	Social Security Number	Number

Participation Agreement

Withdrawal Restrictions - I understand that the Internal Revenue Code (the "Code") and/or my employer's Plan Document may impose restrictions on transfers and/or distributions. I understand that I must contact the Plan Administrator to determine when and/or under what circumstances I am eligible to receive distributions or make transfers.

Investment Options - I understand that by signing and submitting this Participant Enrollment form for processing, I am requesting to have investment options established under the Plan as specified in the Investment Option Information section. I understand and agree that this account is subject to the terms of the Plan Document. I understand and acknowledge that all payments and account values, when based on the experience of the investment options, may not be guaranteed and may fluctuate, and, upon redemption, shares may be worth more or less than their original cost. I acknowledge that investment option information, including prospectuses, disclosure documents and Fund Profile sheets, have been made available to me and I understand the risks of investing.

Asset Allocation Models - If you select an Asset Allocation Model, your funds will be invested among the investment options as indicated below. In applying models to your particular situation, you should consider all of your assets and all of your spouse's assets, including IRAs, mutual funds and other qualified plans. I understand that the Asset Allocation Models listed below are subject to change, and that my contributions will be invested upon receipt into the most current model that the Plan offers. If an Asset Allocation Model is selected and I have also designated my own investment options, the Asset Allocation Model will supersede my own investment options.

Advisor GoalMaker AGGRESSIVE 2005 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 4% FSMDX 3% PIMIX 5% D0859A 31% FSSNX 2% JSERX 2% D2101A 17%

Advisor GoalMaker AGGRESSIVE 2006 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 4% FSMDX 3% PIMIX 5% D0859A 31% FSSNX 2% JSERX 2% D2101A 17%

Advisor GoalMaker AGGRESSIVE 2007 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 4% FSMDX 3% PIMIX 5% D0859A 31% FSSNX 2% JSERX 2% D2101A 17%

Advisor GoalMaker AGGRESSIVE 2008 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 4% FSMDX 3% PIMIX 5% D0859A 31% FSSNX 2% JSERX 2% D2101A 17%

Advisor GoalMaker AGGRESSIVE 2009 - SSGAII 8% D1320A 8% FXAIX 12% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 5% D0859A 31% FSSNX 2% JSERX 2% D2101A 15%

Advisor GoalMaker AGGRESSIVE 2010 - SSGAII 8% D1320A 8% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 5% D0859A 30% FSSNX 2% JSERX 2% D2101A 14%

Advisor GoalMaker AGGRESSIVE 2011 - SSGAII 8% D1320A 9% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 6% FSMDX 4% PIMIX 5% D0859A 28% FSSNX 2% JSERX 2% D2101A 13%

Advisor GoalMaker AGGRESSIVE 2012 - SSGAII 10% D1320A 10% FXAIX 14% HAITX 5% OIEJX 6% CSMUX 6% FSMDX 4% PIMIX 5% D0859A 24% FSSNX 2% JSERX 2% D2101A 12%

Advisor GoalMaker AGGRESSIVE 2013 - SSGAII 10% D1320A 10% FXAIX 15% HAITX 5% OIEJX 6% CSMUX 6% FSMDX 4% PIMIX 5% D0859A 24% FSSNX 2% JSERX 2% D2101A 11%

Advisor GoalMaker AGGRESSIVE 2014 - SSGAII 10% D1320A 10% FXAIX 15% HAITX 6% OIEJX 6% CSMUX 6% FSMDX 5% PIMIX 5% D0859A 23% FSSNX 2% JSERX 2% D2101A 10%

Advisor GoalMaker AGGRESSIVE 2015 - SSGAII 10% D1320A 10% FXAIX 16% HAITX 6% OIEJX 7% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 21% FSSNX 2% JSERX 2% D2101A 9%

Advisor GoalMaker AGGRESSIVE 2016 - SSGAII 10% D1320A 11% FXAIX 17% HAITX 6% OIEJX 7% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 20% FSSNX 2% JSERX 2% D2101A 8%

Advisor GoalMaker AGGRESSIVE 2017 - SSGAII 12% D1320A 11% FXAIX 18% HAITX 6% OIEJX 7% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 17% FSSNX 3% JSERX 2% D2101A 7%

Advisor GoalMaker AGGRESSIVE 2018 - SSGAII 12% D1320A 12% FXAIX 18% HAITX 7% OIEJX 7% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 16% FSSNX 3% JSERX 2% D2101A 6%

Advisor GoalMaker AGGRESSIVE 2019 - SSGAII 12% D1320A 12% FXAIX 18% HAITX 7% OIEJX 7% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 16% FSSNX 3% JSERX 2% D2101A 6%

Advisor GoalMaker AGGRESSIVE 2020 - SSGAII 12% D1320A 12% FXAIX 19% HAITX 7% OIEJX 8% CSMUX 7% FSMDX 5% PIMIX 4% D0859A 15% FSSNX 3% JSERX 2% D2101A 6%

Advisor GoalMaker AGGRESSIVE 2021 - SSGAII 12% D1320A 13% FXAIX 19% HAITX 7% OIEJX 8% CSMUX 8% FSMDX 5% PIMIX 3% D0859A 13% FSSNX 3% JSERX 3% D2101A 6%

Advisor GoalMaker AGGRESSIVE 2022 - SSGAII 12% D1320A 14% FXAIX 20% HAITX 7% OIEJX 8% CSMUX 8% FSMDX 5% PIMIX 3% D0859A 11% FSSNX 3% JSERX 3% D2101A 6%

Advisor GoalMaker AGGRESSIVE 2023 - SSGAII 12% D1320A 14% FXAIX 20% HAITX 7% OIEJX 8% CSMUX 8% FSMDX 5% PIMIX 3% D0859A 11% FSSNX 3% JSERX 3% D2101A 6%

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Advisor GoalMaker AGGRESSIVE 2024 - SSGAII 14% D1320A 14% FXAIX 20% HAITX 16% CSMUX 8% FSMDX 6% PIMIX 4% D0859A 12% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2025 - SSGAII 14% D1320A 14% FXAIX 21% HAITX 16% CSMUX 9% FSMDX 6% PIMIX 4% D0859A 10% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2026 - SSGAII 14% D1320A 14% FXAIX 21% HAITX 16% CSMUX 9% FSMDX 6% PIMIX 4% D0859A 10% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2027 - SSGAII 14% D1320A 15% FXAIX 21% HAITX 17% CSMUX 9% FSMDX 6% PIMIX 3% D0859A 9% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2028 - SSGAII 14% D1320A 15% FXAIX 21% HAITX 17% CSMUX 9% FSMDX 6% PIMIX 3% D0859A 9% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2029 - SSGAII 15% D1320A 15% FXAIX 22% HAITX 17% CSMUX 9% FSMDX 7% PIMIX 3% D0859A 6% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2030 - SSGAII 15% D1320A 15% FXAIX 22% HAITX 17% CSMUX 9% FSMDX 7% PIMIX 3% D0859A 6% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2031 - SSGAII 15% D1320A 15% FXAIX 22% HAITX 17% CSMUX 9% FSMDX 7% PIMIX 3% D0859A 6% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2032 - SSGAII 15% D1320A 16% FXAIX 23% HAITX 18% CSMUX 9% FSMDX 7% PIMIX 2% D0859A 4% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2033 - SSGAII 15% D1320A 16% FXAIX 23% HAITX 18% CSMUX 9% FSMDX 7% PIMIX 2% D0859A 4% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2034 - SSGAII 16% D1320A 16% FXAIX 23% HAITX 18% CSMUX 9% FSMDX 7% PIMIX 2% D0859A 3% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2035 - SSGAII 16% D1320A 16% FXAIX 24% HAITX 18% CSMUX 10% FSMDX 7% D0859A 3% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2036 - SSGAII 16% D1320A 16% FXAIX 24% HAITX 18% CSMUX 10% FSMDX 7% D0859A 3% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2037 - SSGAII 16% D1320A 16% FXAIX 24% HAITX 18% CSMUX 10% FSMDX 7% D0859A 3% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2038 - SSGAII 16% D1320A 16% FXAIX 24% HAITX 18% CSMUX 10% FSMDX 7% D0859A 3% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2039 - SSGAII 16% D1320A 16% FXAIX 24% HAITX 19% CSMUX 9% FSMDX 7% D0859A 3% FSSNX 3% JSERX 3%

Advisor GoalMaker AGGRESSIVE 2040 - SSGAII 16% D1320A 16% FXAIX 25% HAITX 19% CSMUX 10% FSMDX 7% FSSNX 4% JSERX 3%

Advisor GoalMaker CONS 2005 - SSGAII 6% D1320A 6% FXAIX 10% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 35% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker CONS 2006 - SSGAII 6% D1320A 6% FXAIX 10% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 35% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker CONS 2007 - SSGAII 6% D1320A 6% FXAIX 10% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 35% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker CONS 2008 - SSGAII 6% D1320A 6% FXAIX 10% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 35% FSSNX 2% JSERX 1% D2101A 18%

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Advisor GoalMaker CONS 2010 - SSGAII 6% D1320A 7% FXAIX 10% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 34% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker CONS 2011 - SSGAII 6% D1320A 7% FXAIX 11% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 34% FSSNX 2% JSERX 1% D2101A 17%

Advisor GoalMaker CONS 2012 - SSGAII 7% D1320A 8% FXAIX 11% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 33% FSSNX 2% JSERX 1% D2101A 16%

Advisor GoalMaker CONS 2013 - SSGAII 7% D1320A 8% FXAIX 11% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 33% FSSNX 2% JSERX 1% D2101A 16%

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Advisor GoalMaker CONS 2014 - SSGAII 7% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 4% FSMDX 3% PIMIX 7% D0859A 33% FSSNX 2% JSERX 1% D2101A 15%

Advisor GoalMaker CONS 2015 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 31% FSSNX 2% JSERX 1% D2101A 15%

Advisor GoalMaker CONS 2016 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 31% FSSNX 2% JSERX 1% D2101A 15%

Advisor GoalMaker CONS 2017 - SSGAII 8% D1320A 8% FXAIX 12% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 29% FSSNX 2% JSERX 2% D2101A 15%

Advisor GoalMaker CONS 2018 - SSGAII 8% D1320A 8% FXAIX 12% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 29% FSSNX 2% JSERX 2% D2101A 15%

Advisor GoalMaker CONS 2019 - SSGAII 8% D1320A 8% FXAIX 12% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 29% FSSNX 2% JSERX 2% D2101A 15%

Advisor GoalMaker CONS 2020 - SSGAII 8% D1320A 8% FXAIX 12% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 29% FSSNX 2% JSERX 2% D2101A 15%

Advisor GoalMaker CONS 2021 - SSGAII 8% D1320A 8% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 28% FSSNX 2% JSERX 2% D2101A 14%

Advisor GoalMaker CONS 2022 - SSGAII 8% D1320A 8% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 7% D0859A 28% FSSNX 2% JSERX 2% D2101A 14%

Advisor GoalMaker CONS 2023 - SSGAII 8% D1320A 9% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 4% PIMIX 7% D0859A 26% FSSNX 2% JSERX 2% D2101A 14%

Advisor GoalMaker CONS 2024 - SSGAII 10% D1320A 10% FXAIX 14% HAITX 11% CSMUX 5% FSMDX 4% PIMIX 9% D0859A 33% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2025 - SSGAII 10% D1320A 10% FXAIX 15% HAITX 11% CSMUX 6% FSMDX 4% PIMIX 8% D0859A 32% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2026 - SSGAII 10% D1320A 10% FXAIX 15% HAITX 12% CSMUX 6% FSMDX 4% PIMIX 8% D0859A 31% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2027 - SSGAII 10% D1320A 11% FXAIX 15% HAITX 12% CSMUX 6% FSMDX 4% PIMIX 8% D0859A 30% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2028 - SSGAII 10% D1320A 11% FXAIX 16% HAITX 12% CSMUX 6% FSMDX 5% PIMIX 6% D0859A 30% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2029 - SSGAII 10% D1320A 11% FXAIX 16% HAITX 13% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 29% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2030 - SSGAII 10% D1320A 11% FXAIX 17% HAITX 13% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 28% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2031 - SSGAII 12% D1320A 12% FXAIX 18% HAITX 13% CSMUX 6% FSMDX 5% PIMIX 5% D0859A 25% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2032 - SSGAII 12% D1320A 12% FXAIX 18% HAITX 13% CSMUX 6% FSMDX 5% PIMIX 5% D0859A 25% FSSNX 2% JSERX 2%

Advisor GoalMaker CONS 2033 - SSGAII 12% D1320A 12% FXAIX 18% HAITX 14% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 22% FSSNX 3% JSERX 2%

Advisor GoalMaker CONS 2034 - SSGAII 12% D1320A 13% FXAIX 18% HAITX 14% CSMUX 8% FSMDX 5% PIMIX 5% D0859A 20% FSSNX 3% JSERX 2%

Advisor GoalMaker CONS 2035 - SSGAII 12% D1320A 13% FXAIX 19% HAITX 15% CSMUX 7% FSMDX 5% PIMIX 4% D0859A 20% FSSNX 3% JSERX 2%

Advisor GoalMaker CONS 2036 - SSGAII 12% D1320A 13% FXAIX 20% HAITX 15% CSMUX 8% FSMDX 6% PIMIX 4% D0859A 17% FSSNX 3% JSERX 2%

Advisor GoalMaker CONS 2037 - SSGAII 12% D1320A 13% FXAIX 20% HAITX 15% CSMUX 8% FSMDX 6% PIMIX 4% D0859A 17% FSSNX 3% JSERX 2%

Advisor GoalMaker CONS 2038 - SSGAII 14% D1320A 14% FXAIX 20% HAITX 16% CSMUX 8% FSMDX 6% PIMIX 3% D0859A 14% FSSNX 3% JSERX 2%

Advisor GoalMaker CONS 2039 - SSGAII 14% D1320A 14% FXAIX 20% HAITX 16% CSMUX 8% FSMDX 6% PIMIX 3% D0859A 14% FSSNX 3% JSERX 2%

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Advisor GoalMaker CONS 2040 - SSGAII 14% D1320A 14% FXAIX 21% HAITX 16% CSMUX 9% FSMDX 6% PIMIX 3% D0859A 12% FSSNX 3% JSERX 2%

Advisor GoalMaker MODERATE 2005 - D1320A 8% FXAIX 11% SSGAII 6% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 2% PIMIX 6% D0859A 34% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker MODERATE 2006 - SSGAII 6% D1320A 8% FXAIX 11% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 2% PIMIX 6% D0859A 34% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker MODERATE 2007 - SSGAII 6% D1320A 8% FXAIX 11% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 2% PIMIX 6% D0859A 34% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker MODERATE 2008 - SSGAII 6% D1320A 8% FXAIX 11% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 2% PIMIX 6% D0859A 34% FSSNX 2% JSERX 1% D2101A 18%

Advisor GoalMaker MODERATE 2009 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 4% CSMUX 4% FSMDX 2% PIMIX 6% D0859A 33% FSSNX 2% JSERX 1% D2101A 17%

Advisor GoalMaker MODERATE 2010 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 4% FSMDX 3% PIMIX 6% D0859A 32% FSSNX 2% JSERX 1% D2101A 16%

Advisor GoalMaker MODERATE 2011 - SSGAII 8% D1320A 8% FXAIX 11% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 6% D0859A 31% FSSNX 2% JSERX 1% D2101A 16%

Advisor GoalMaker MODERATE 2012 - SSGAII 8% D1320A 8% FXAIX 12% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 6% D0859A 30% FSSNX 2% JSERX 2% D2101A 15%

Advisor GoalMaker MODERATE 2013 - SSGAII 8% D1320A 8% FXAIX 12% HAITX 4% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 6% D0859A 30% FSSNX 2% JSERX 2% D2101A 15%

Advisor GoalMaker MODERATE 2014 - SSGAII 8% D1320A 8% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 6% D0859A 29% FSSNX 2% JSERX 2% D2101A 14%

Advisor GoalMaker MODERATE 2015 - SSGAII 8% D1320A 8% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 3% PIMIX 6% D0859A 29% FSSNX 2% JSERX 2% D2101A 14%

Advisor GoalMaker MODERATE 2016 - SSGAII 8% D1320A 8% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 4% PIMIX 6% D0859A 28% FSSNX 2% JSERX 2% D2101A 14%

Advisor GoalMaker MODERATE 2017 - SSGAII 8% D1320A 9% FXAIX 13% HAITX 5% OIEJX 5% CSMUX 5% FSMDX 4% PIMIX 6% D0859A 28% FSSNX 2% JSERX 2% D2101A 13%

Advisor GoalMaker MODERATE 2018 - SSGAII 8% D1320A 9% FXAIX 13% HAITX 5% OIEJX 6% CSMUX 6% FSMDX 4% PIMIX 6% D0859A 27% FSSNX 2% JSERX 2% D2101A 12%

Advisor GoalMaker MODERATE 2019 - SSGAII 10% D1320A 10% FXAIX 13% HAITX 5% OIEJX 6% CSMUX 6% FSMDX 4% PIMIX 6% D0859A 24% FSSNX 2% JSERX 2% D2101A 12%

Advisor GoalMaker MODERATE 2020 - SSGAII 10% D1320A 10% FXAIX 14% HAITX 5% OIEJX 6% CSMUX 6% FSMDX 4% PIMIX 6% D0859A 24% FSSNX 2% JSERX 2% D2101A 11%

Advisor GoalMaker MODERATE 2021 - SSGAII 10% D1320A 10% FXAIX 15% HAITX 5% OIEJX 6% CSMUX 6% FSMDX 4% PIMIX 6% D0859A 24% FSSNX 2% JSERX 2% D2101A 10%

Advisor GoalMaker MODERATE 2022 - SSGAII 10% D1320A 10% FXAIX 15% HAITX 5% OIEJX 6% CSMUX 6% FSMDX 4% PIMIX 6% D0859A 24% FSSNX 2% JSERX 2% D2101A 10%

Advisor GoalMaker MODERATE 2023 - SSGAII 10% D1320A 10% FXAIX 15% HAITX 6% OIEJX 6% CSMUX 6% FSMDX 5% PIMIX 6% D0859A 22% FSSNX 2% JSERX 2% D2101A 10%

Advisor GoalMaker MODERATE 2024 - SSGAII 10% D1320A 11% FXAIX 16% HAITX 13% CSMUX 7% FSMDX 5% PIMIX 6% D0859A 28% FSSNX 2% JSERX 2%

Advisor GoalMaker MODERATE 2025 - SSGAII 10% D1320A 11% FXAIX 17% HAITX 13% CSMUX 7% FSMDX 5% PIMIX 6% D0859A 27% FSSNX 2% JSERX 2%

Advisor GoalMaker MODERATE 2026 - SSGAII 12% D1320A 11% FXAIX 18% HAITX 13% CSMUX 7% FSMDX 5% PIMIX 6% D0859A 23% FSSNX 3% JSERX 2%

Advisor GoalMaker MODERATE 2027 - SSGAII 12% D1320A 11% FXAIX 18% HAITX 13% CSMUX 7% FSMDX 5% PIMIX 6% D0859A 23% FSSNX 3% JSERX 2%

Advisor GoalMaker MODERATE 2028 - SSGAII 12% D1320A 11% FXAIX 18% HAITX 14% CSMUX 7% FSMDX 5% PIMIX 6% D0859A 22% FSSNX 3% JSERX 2%

Advisor GoalMaker MODERATE 2029 - SSGAII 12% D1320A 12% FXAIX 18% HAITX 14% CSMUX 7% FSMDX 5% PIMIX 5% D0859A 22% FSSNX 3% JSERX 2%

						525127-01
Last Name	First Name	M.I.		ecurity Number		Number
Advisor GoalMaker MODERA PIMIX 5% D0859A 18% FSSN		D1320A 13%	FXAIX 19%	HAITX 14%	CSMUX 8%	FSMDX 5%
<mark>Advisor GoalMaker MODERA</mark> PIMIX 5% D0859A 16% FSSN		D1320A 12%	FXAIX 20%	HAITX 15%	CSMUX 8%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 5% D0859A 16% FSSN		D1320A 12%	FXAIX 20%	HAITX 15%	CSMUX 8%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 5% D0859A 13% FSSN		D1320A 13%	FXAIX 20%	HAITX 15%	CSMUX 8%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 5% D0859A 13% FSSN		D1320A 14%	FXAIX 20%	HAITX 16%	CSMUX 7%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 4% D0859A 10% FSSN		D1320A 14%	FXAIX 21%	HAITX 16%	CSMUX 9%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 4% D0859A 8% FSSNX		D1320A 15%	FXAIX 21%	HAITX 17%	CSMUX 9%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 4% D0859A 8% FSSNX		D1320A 15%	FXAIX 22%	HAITX 17%	CSMUX 8%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 4% D0859A 8% FSSNX		D1320A 15%	FXAIX 22%	HAITX 17%	CSMUX 8%	FSMDX 6%
Advisor GoalMaker MODERA PIMIX 3% D0859A 6% FSSNX		D1320A 15%	FXAIX 22%	HAITX 17%	CSMUX 9%	FSMDX 7%
Advisor GoalMaker MODERA PIMIX 3% D0859A 6% FSSNX		D1320A 15%	FXAIX 22%	HAITX 17%	CSMUX 9%	FSMDX 7%
Your account will be rebalanced assure a profit and does not prote			your selected	Asset Allocat	ion Model. Re	balancing does no
Compliance With Plan Docume necessary to ensure that my partic Code. I understand that the maxim that it is my responsibility to more contribution limit, I assume sole I	cipation in the Plan is in c num annual limit on contri nitor my total annual contri	ompliance with butions is deter ributions to ens	any applicable and any applicable and any applicable and any are that I do n	le requirement ne Plan Docum ot exceed the a	of the Plan Deent and/or the	ocument and/or the Code. I understand
Incomplete Forms - I understand at the address below prior to the allocating them to the default involve the payor as required by law. On the payor as the Web site in on after an account is established on	receipt of any deposits, lestment option selected before an account has been reder to transfer monies from	I specifically c y the Plan. If no established on the default in	onsent to Serve default investing my behalf, I investment opti	rice Provider r stment option i understand that on. Also, I und	etaining all m s selected, fun t I must call the erstand all cor	onies received and ds will be returne he Voice Respons
Account Corrections - I underst errors. Corrections will be made of days, account information shall b correction will only be processed	only for errors which I cone deemed accurate and ac	mmunicate with ceptable to me	nin 90 calenda If I notify Se	r days of the la rvice Provider	ıst calendar qı	arter. After this 9
Signature(s) and Consent						
Participant Consent						
have completed, understand and	agree to all pages of this	Participant En	rollment form.			
Deferral agreements must be ente	red into prior to the first of	day of the mon	th that the defe	erral will be ma	ade.	
Participant Signature			Date			
A handwritten signature is requi						

						525127-01
Last Name		First Name	M.I.	Social S	Security Number	Number
Authorized Plan Administrato	r Approval					
Authorized Plan Administra	itor Signat	ure -		Date		
A handwritten signature is re	quired on t	his form. An electronic sign	nature w	rill not be	accepted and will re	sult in a significant delay.
Print Full Name						
Return form to Alameda Co	unty.					
By regular/express mail: The County of Alameda Freasurer's Office, Attn: DC A 1221 Oak Street, 1st Floor, Ro		By interoffice mail: QIC 20114 Attn: Human Resources		OR	By fax to: 1-510-272-3856	

After all signatures have been obtained, this form can be:

Oakland, CA 94612

OR **Uploaded electronically to:** OR Sent regular mail to: Sent express mail to:

Login to account at Empower Empower

PO Box 56025

alamedacountydcp.com 8515 E. Orchard Road

Boston, MA 02205-6025 Click on *Upload Documents* to submit Greenwood Village, CO 80111

We will not accept hand delivered forms at express mail addresses.

The group variable annuity insurance products are issued through Empower Annuity Insurance Company, Hartford, CT and distributed through Prudential Investment Management Services, LLC (PIMS). Each organization is solely responsible for its financial condition and contractual obligations. PIMS is not affiliated with Empower Retirement, LLC. Annuity contracts contain exclusions, limitations, reductions of benefits and terms for keeping them in force. The annuity or certain of its investment options or features may not be available in all states. Policy forms currently available include DC- 08-TGWB-2011, ALC-408-TGWB-2011-NR, ALC-408-TGWB-2011-ROTH, IND-IFX-TGWB-2013-NR, IND-IFX-TGWB-2013-ROTH or state variation thereof.

You could lose money by investing in money market investments. Although they seek to preserve the value of your investment at \$1 or \$10.00 per share (see the prospectus), there is no guarantee they will. An investment in a money market investment is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. The money market investment's sponsor has no legal obligation to provide financial support to the portfolio, and you should not expect that the sponsor will provide financial support to the portfolio at any time. The yield quotation more closely reflects the current earnings of the portfolio than the total return quotation.



Beneficiary Designation Governmental 457(b) Plan

525127-01 ALAMEDA COUNTY 457(B) DEFERRED COMPENSATION PLAN For My Information • For questions regarding this form, visit the website at alamedacountydcp.com or contact Service Provider at 1-855-WOW-457B. · Use black or blue ink when completing this form. Participant Information Account extension, if applicable, identifies funds transferred to a beneficiary due to participant's death, alternate payee due to divorce or a participant with multiple accounts. Account Extension Social Security Number (Must provide all 9 digits) First Name МΙ Date of Birth Last Name (The name provided MUST match the name on file with Service Provider.) Married Unmarried Beneficiary Designation (Attach an additional sheet to name additional beneficiaries.) Primary Beneficiary Designation (Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.) If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must consent to my beneficiary designation. See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, charity or estate. % % of Account Balance Primary Beneficiary Name Date of Birth Social Security or Taxpayer (Name of Individual, Trust, Charity, etc.) Identification Number or Trust Date Street Address State Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.) Phone Number (Optional) □ Spouse □ Child □ Parent □ Grandchild □ Sibling □ My Estate □ A Trust □ Other Domestic Partner % of Account Balance Primary Beneficiary Name Social Security or Taxpayer Date of Birth (Name of Individual, Trust, Charity, etc.) Identification Number or Trust Date Street Address City State Zip Code Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.) Phone Number (Optional) □ Spouse □ Child □ Parent □ Grandchild □ Sibling □ My Estate □ A Trust □ Other Domestic Partner % Primary Beneficiary Name Date of Birth % of Account Balance Social Security or Taxpayer (Name of Individual, Trust, Charity, etc.) Identification Number or Trust Date Street Address State Zip Code City Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.) Phone Number (Optional) □ Spouse □ Child □ Parent □ Grandchild □ Sibling □ My Estate □ A Trust □ Other Domestic Partner Contingent Beneficiary Designation (Contingent beneficiary designations must total 100% - percentage can be made out to two decimal places.) % of Account Balance Contingent Beneficiary Name Social Security or Taxpayer Date of Birth (Name of Individual, Trust, Charity, etc.) Identification Number or Trust Date Street Address State Zip Code City Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification.) Phone Number (Optional) □ Spouse □ Child □ Parent □ Grandchild □ Sibling □ My Estate □ A Trust □ Other

Domestic Partner

Last	t Name	First Name	M.I.	Social Security Number	525127-01 Number						
Ве	neficiary Designati	On (Attach an additional sheet to name ac	dditional benefici	iaries.)							
Со	Contingent Beneficiary Designation (Contingent beneficiary designations must total 100% - percentage can be made out to two decimal places.)										
	%										
%		Contingent Beneficiary Name (Name of Individual, Trust, Charity, etc.)		Social Security or Taxpayer Identification Number	Date of Birth or Trust Date						
Str	reet Address	City		State	Zip Code						
Ph	none Number (Optional)		•	s not provided, request will be rejected a Grandchild							
_	%										
%	of Account Balance	Contingent Beneficiary Name (Name of Individual, Trust, Charity, etc.)		Social Security or Taxpayer Identification Number	Date of Birth or Trust Date						
Str	reet Address	City		State	Zip Code						
Ph	none Number (Optional)		•	s not provided, request will be rejected a Grandchild □ Sibling □ My Es	•						
Siç	gnatures and Cons	ent (Signatures must be on the lines provide	ed.)								
Pa	rticipant Consent f	or Beneficiary Designation (Please	sign on the 'Partic	cipant Signature' line below.)							
ab be	ove beneficiary designa neficiary designations i	stand and agree to all pages of this Be ations for my vested account in the even in my account and to update the benefic c change that may impact my beneficiary	nt of my death. I siary designation	acknowledge and agree that it is m	ny responsibility to monitor t						
be as de:	If I have more than one primary beneficiary, the account will be divided as specified. If a primary beneficiary predeceases me, his or her benefit will be allocated to the surviving primary beneficiaries. Contingent beneficiaries will receive a benefit only if there is no surviving primary beneficiary, as specified. If a contingent beneficiary predeceases me, his or her benefit will be allocated to the surviving contingent beneficiaries. If I fail to designate beneficiaries, amounts will be paid pursuant to the terms of the Plan or applicable law. This designation is effective upon execution and delivery to Service Provider. If any information is missing, additional information may be required prior to recording my designation.										
de		des all prior designations. Beneficiaries ally. Primary and contingent beneficia e: 33.33%).									
		married and I elect a primary beneficiary sent for Beneficiary Designation section		spouse or in addition to my spouse	e, my spouse must consent						
_ A	ny person who pre	sents a false or fraudulent claim	is subject to	criminal and civil penalties.							
IA											
	articipant Signatu			Date (Reg	wired)						

	Last Name		First Nan	ne	M.I.	Soc	cial Security I	Number	525127-01 Number	
С	Signatures and Consent (Signatures must be on the lines provided.)									
	Spousal Consent for Ber	nefic	iary Designat	ion (If applicable,	please have th	e Spouse	sign on the 'S	pouse's Signature	' line below.)	
	Spouse to complete: I, (name to the participant's primary be that I will not receive 100% of it. I understand that my consor her vested account balance	of his ent is	or her vested a	account balance	under the Pla	an and th	nat my spous	se's election is r	not valid unless I consent to	
	Spouse's Signature _							Date (Requ	ired)	
	A handwritten signature is			m. An electronic	c signature v					
	The spouse's signature must must match the date of the Nono more than 180 days prio or notarial certificate, your ATTENTION Notary Public:	otary or to t spou	Public signature the effective data	on the separate te of the origina ign on the abov	jurat or notar I request in o e spouse's s	ial certifi order to l ignature	cate or in this be effective. Ine and en	s section below. If your notary of the the date on	Consent must be obtained completes a separate jurat this form.	
	jurat or notarial certificate,					oquiioiii		ui otatoi ii you.	otato roquiros a coparato	
	We require that the followinotarized; (2) the plan name; do not include this information and you complete the section	; (3) t n will	he plan number; be rejected and	and (4) participa will delay the with	ant's and spor	use's nar est. If you	mes. Separat ir state does	te jurat or notari require a separa	al certificates submitted that	
	If your state does not require	a se	parate jurat or n	arate jurat or notarial certificate, you may complete the notary section below.						
	Statement of Notary	-	seal must be v		and swor	n <i>(or affirme</i>	d)			
				this, by				,	0541	
)ss.		pouse)				SEAL		
	County/Parish/Borough	,	proved to me of	to me on the basis of satisfactory evidence to be the person speared before me, who affirmed that such consent represents						
	of)	ı		before me, who d voluntary act.	affirmed that	such con	sent represe	represents		
				·						
	Notary Public's signature A handwritten signature is							•	•	
	Notary Public's full name	•			•		•		•	
D	Delivery Instructions									
_										
	Return form to Alameda Co By regular/express mail:	unity	OR	By interoffice r	mail·	OR	By fax to			
	The County of Alameda		OK	QIC 20114	nan.	OIC	1-510-272			
	Treasurer's Office, Attn: DC Admin Attn: Human Re 1221 Oak Street, 1st Floor, Room 131 Oakland, CA 94612									
	After all signatures have be	een o	btained, this fo	rm can be						
	Uploaded Electronically: Login to account at alamedacountydcp.com Click on Upload Documents to	to sul	OR	Empower PO Box 56	lar Mail to: 025 \ 02205-6025		OR	Sent Express Empower 8515 E. Orcha Greenwood V		
We will not accept hand delivered forms at Express Mail addresses.										

The group variable annuity insurance products are issued through Empower Annuity Insurance Company, Hartford, CT and distributed through Prudential Investment Management Services, LLC (PIMS). Each organization is solely responsible for its financial condition and contractual obligations. PIMS is not affiliated with Empower Retirement, LLC. Annuity contracts contain exclusions, limitations, reductions of benefits and terms for keeping them in force. The annuity or certain of its investment options or features may not be available in all states. Policy forms currently available include DC- 08-TGWB-2011, ALC-408-TGWB-2011-ROTH, IND-IFX-TGWB-2013-NR, IND-IFX-TGWB-2013-ROTH or state variation thereof.

You could lose money by investing in money market investments. Although they seek to preserve the value of your investment at \$1 or \$10.00 per share (see the prospectus), there is no guarantee they will. An investment in a money market investment is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. The money market investment's sponsor has no legal obligation to provide financial support to the portfolio, and you should not expect that the sponsor will provide financial support to the portfolio at any time. The yield quotation more closely reflects the current earnings of the portfolio than the total return quotation.

STD FBENED 02/01/24

525127-01

CHG NUPART

This page is for informational purposes only - Do not return with the Beneficiary Designation form EXAMPLE BENEFICIARY DESIGNATIONS Example 1: Multiple Individuals as Beneficiaries

<u>=xa</u>	inple 1. Multiple inaly	viduais as belieficiaries							
В	Beneficiary Designation (Attach an additional sheet to name additional beneficiaries.)								
	Primary Beneficiary Do	rimary Beneficiary Designation (Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)							
	 If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must conset to my beneficiary designation. See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, char 								
	or estate.	3.33 % John M. Doe XXX-XX-XXXX 01/06/1954							
	% of Account Balance	Primary Beneficiary	Social Security or Taxpayer	Date of Birth					
	 .	(Name of Individual, Trust, Charity, etc.)	Identification Number	or Trust Date					
	111 Elm Street	Anytown	MO	60000					
	Street Address	City	State	Zip Code					
	(XXX) XXX-XXXX		Relationship is not provided, request will be rejected						
	Phone Number (Optional)	☐ Spouse ☐ Child ☐ Domestic Partner	Parent ☐ Grandchild ■ Sibling ☐ My E	.state L A Trust L Other					
	33.33 %	Don M. Doe	XXX-XX-XXXX	01/06/1954					
	% of Account Balance	Primary Beneficiary (Name of Individual, Trust, Charity, etc.)	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date					
	222 North Avenue	Anytown	CA	90000					
	Street Address	City	State	Zip Code					
	(XXX) XXX-XXXX	Relationship (Required - If	Relationship is not provided, request will be rejected	and sent back for clarification.)					
	Phone Number (Optional)	□ Spouse □ Child □ □ Domestic Partner	Parent ☐ Grandchild ■ Sibling ☐ My E	state A Trust Other					
	33.34 %	Michelle L. Doe	XXX-XX-XXXX	01/06/1957					
	% of Account Balance	Primary Beneficiary (Name of Individual, Trust, Charity, etc.)	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date					
	333 West Blvd	Anytown	CO	80000					
	Street Address	City	State	Zip Code					
	(XXX) XXX-XXXX	Relationship (Required - If	Relationship is not provided, request will be rejected	and sent back for clarification.)					
	Phone Number (Optional)	□ Spouse □ Child □ □ Domestic Partner	Parent ☐ Grandchild ■ Sibling ☐ My E	state A Trust Other					
Exa	mple 2: Trust as Ben	eficiary							
В		On (Attach an additional sheet to name addit	ional beneficiaries.)						
	Primary Beneficiary Do	esignation (Primary beneficiary designation	ons must total 100% - percentage can be made o	ut to two decimal places.)					
	 If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must consert to my beneficiary designation. See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, charit or estate. 								
	% of Account Balance	Primary Beneficiary	Social Security or Taxpayer	06/30/2015 Date of Birth					
		(Name of Individual, Trust, Charity, etc.)	Identification Number	or Trust Date					
	150 Main Street	Anytown	MO	60000					
	Street Address	City	State	Zip Code					
	(XXX) XXX-XXXX		Relationship is not provided, request will be rejected	•					
	Phone Number (Optional) □ Spouse □ Child □ Parent □ Grandchild □ Sibling □ My Estate ■ A Trust □ Other □ Domestic Partner								

This page is for informational purposes only - Do not return with the Beneficiary Designation form EXAMPLE BENEFICIARY DESIGNATIONS

Example 3: Estate as Beneficiary

В	Beneficiary Designation	Beneficiary Designation (Attach an additional sheet to name additional beneficiaries.)								
	Primary Beneficiary D	Primary Beneficiary Designation (Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)								
	to my beneficiary design	n requires my spouse to be named as primary gnation. pples on how to complete the below benefician	,	, , ,						
	or estate.	Fatata of Assa Dec								
	100 %	Estate of Anne Doe		/ /						
	% of Account Balance	Primary Beneficiary (Name of Individual, Trust, Charity, etc.)	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date						
	45 East Road	Anytown	MO	60000						
	Street Address	City	State	Zip Code						
	(XXX) XXX-XXXX Relationship (Required - If Relationship is not provided, request will be rejected and sent back for clarification									
	Phone Number (Optional) □ Spouse □ Child □ Parent □ Grandchild □ Sibling ■ My Estate □ A Trust □ Other									
		Domestic Partner								
Exa	ample 4: Charity as B	eneficiary								
В	Beneficiary Designation (Attach an additional sheet to name additional beneficiaries.)									
	Primary Beneficiary Designation (Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)									
	 If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must cons to my beneficiary designation. See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, cha or estate. 									
	100 %	ABC Charity	XX-XXXXXXX	1 1						
	% of Account Balance	Primary Beneficiary (Name of Individual, Trust, Charity, etc.)	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date						
	75 South Place	Anytown	CO	80000						
	Street Address	City	State	Zip Code						
	(XXX) XXX-XXXX	Relationship (Required - If Relationship	ationship is not provided, request will be rejected	and sent back for clarification.)						
	Phone Number (Optional)	☐ Spouse ☐ Child ☐ Pa	rent 🛘 Grandchild 🖵 Sibling 🖵 My E	state 🗆 A Trust ■ Other						
		Domestic Partner								