I.B.E.W. & Electrical Industry Local 697

Money Purchase Plan and Trust

Plan # 092123

Enrollment/Change

Account Information

Check one: ☐ New Enrollment ☐ Re-Enrollment ☐ Change ☐ QDRO/Alternate Payee

Social Security # ___ – __ – ____

Name (Last, First, MI)

Address

City **State** **Zip**

Date of birth (mm/dd/yyyy) __ – __ – ____ – ____

Date of hire (mm/dd/yyyy) __ – __ – ____ **Plan entry date** (mm/dd/yyyy) __ – __ – ____

☐ Check here if address listed above is a new address.

Investment Directions

I hereby direct that all future employer contributions be invested in the following manner. The total must equal 100%.

Target Retirement Funds

If you choose a Vanguard Target Retirement Fund, it is advised that you specify one fund in which to invest 100% of your contributions.

Fund Code	Fund Name	Allocation	Fund Code	Fund Name	Allocation
001673	Vanguard Institutional Target Retirement Income Fund		001668	Vanguard Institutional Target Retirement 2040 Fund	
001663	Vanguard Institutional Target Retirement 2015 Fund		001669	Vanguard Institutional Target Retirement 2045 Fund	
001664	Vanguard Institutional Target Retirement 2020 Fund		001670	Vanguard Institutional Target Retirement 2050 Fund	
001665	Vanguard Institutional Target Retirement 2025 Fund		001671	Vanguard Institutional Target Retirement 2055 Fund	
001666	Vanguard Institutional Target Retirement 2030 Fund		001672	Vanguard Institutional Target Retirement 2060 Fund	
001667	Vanguard Institutional Target Retirement 2035 Fund		001792	Vanguard Institutional Target Retirement 2065 Fund	

Core Funds

Or for the following list of funds, specify percentages in 1% increments. The total must equal 100%.

Fund Code	Fund Name	Allocation	Fund Code	Fund Name	Allocation
00007E	Vanguard Retirement Savings Trust III		000046	Vanguard International Value Fund	
000066	Vanguard Prime Money Market Fund		005860	Vanguard Small-Cap Value Index Fund	
00002K	Vanguard Total Bond Market Index Fund		005861	Vanguard Small-Cap Growth Index Fund	
000527	Vanguard Wellesley Income Fund		000529	Vanguard High-Yield Corporate Fund	
000094	Vanguard Institutional Index Fund		005533	Vanguard Emerging Markets Stock Index Fund	
000573	Vanguard Windsor II Fund		005859	Vanguard Mid-Cap Index Fund	
0000XI	Vanguard Growth Index Fund		005832	Vanguard Mid-Cap Growth Index Fund	
000559	Vanguard PRIMECAP Fund		005835	Vanguard Mid-Cap Value Index Fund	
0000X7	Vanguard Small-Cap Index Fund		003449	Metropolitan West Total Return Bond Fund	

Your allocations must total 100%. 1 0 0

Note: If you fail to complete the investment elections above, your contribution will automatically be invested in the age-appropriate Vanguard Target Retirement Fund.

Authorization

Signature of Employee Date

Signature of Plan Administrator Date

Please make a copy for your records.

(03/26/2019)

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