



LifeStage Investment Management Service Election Form – Self-directed Accounts

United Methodist Personal Investment Plan (UMPIP), Clergy Retirement Security Program (CRSP) Defined Contribution (DC), Retirement Security Program for General Agencies (RSP) DC, Horizon 401(k) Plan (HRZ)

Part I – Participant Information

Name _____ Social Security # _____
Address _____ Phone # _____
_____ E-mail address _____

Part 2 – LifeStage Investment Management Service Election

The LifeStage Investment Management Service (LifeStage) 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 or you may use the LifeStage default investment profile. Please refer to the brochure *General Board Investing Opportunities* for more information.

By electing LifeStage, you authorize the General Board of Pension and Health Benefits (General Board) to allow LifeStage to manage the investment of your self-directed accounts (includes UMPIP, CRSP DC, RSP DC and Horizon). You may discontinue the use of LifeStage and choose among the General Board investment funds at any time.

- I elect **LifeStage** to manage my UMPIP, CRSP DC, RSP DC and/or Horizon account balances. I understand that while this election is in effect, LifeStage will choose investment funds for me. If desired, please go to Part 3 to complete the *LifeStage Personal Investment Profile*. (Skip Part 4 and sign and date the form in Part 5.)
- I elect to choose the investment funds for my UMPIP, CRSP DC, RSP DC and/or Horizon account balances. I understand I must make an investment fund election for these accounts otherwise my account balances will be invested by LifeStage. (Complete Parts 4 and 5.)

Part 3 – LifeStage Personal Investment Profile

To make the selections for your profile, please answer the following questions. Question 2 applies only to clergy participants in the Ministerial Pension Plan (MPP). With the exception of question 3, you may change these variables as often as you wish. If you select “No” for question 3, you may not select “Yes” at a later time. For more information regarding these selections, please refer to the General Board Investing Opportunities brochure.

1. My risk tolerance is: High Moderate Low
(The default setting is Moderate.)
2. I anticipate beginning to receive Ministerial Pension Plan (MPP) monthly benefit payments at age: _____ (enter age)
(The default setting is 65.)
3. I will qualify to receive Social Security benefits when I retire: Yes No
(The default setting is Yes.)

continued

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 self-directed accounts (includes UMPIP, CRSP DC, RSP DC 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 Web site at www.gbophb.org or in our *Investment Fund Options* brochure.

	Election for Current Account Balance¹	Election for Future Contributions²
Stable Value Fund	_____ %	_____ %
Inflation Protection Fund	_____ %	_____ %
Domestic Bond Fund	_____ %	_____ %
Multiple Asset Fund	_____ %	_____ %
Balanced Social Values Plus Fund	_____ %	_____ %
Domestic Stock Fund	_____ %	_____ %
International Stock Fund	_____ %	_____ %
Total	100%	100%

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

²An **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.**

Part 5 – Signature

I received a copy of *General Board Investing Opportunities* explaining the implications of the elections I have made on this form. I understand and accept the actions I have taken with this election form.

Signature _____ Date _____

Please mail this original form to the Data Team at the address on the first page of this form. Be sure to keep a copy for your records. Or, you may fax it to the Data Team at 1-847-866-5195.