

INVESTMENT CHANGE FORM

Accountholder: _____

Cert #: _____

The JRB Investment Change Form instructs the JRB how to invest new contributions to your account, re-align your existing holdings, or both. Please select the appropriate choice. Please express the percentages as whole numbers, not fractions.

- Invest my new contributions according to the percentages below
 Realign my entire account holdings to the percentages below
 Both

To reallocate a portion of your account holdings rather than the entire portfolio, please complete and return a [Fund Transfer Form](#). To make changes online, go to www.jrbcj.org and click on "Log Into My Account." If you prefer the JRB to process the change for you, please complete and return this form to us via mail, fax (212-947-1676) or email to staff@jrbcj.org. **Please confirm requests made by email** by calling 888-JRB-FREE (572-3733). The JRB will process the transfer by the end of the next business day after receiving it.

Managed Funds	
<u>Stable Value</u>	New %
Stable Value Interest Fund	_____ %
<u>Bond Funds</u>	
Vanguard Inflation-Protected Secs I	_____ %
Goldman Sachs US Mortgages R6	_____ %
Western Asset Core Bond I	_____ %
Fidelity Strategic Income	_____ %
<u>Hybrid (Stocks and Bonds)</u>	
Fidelity Puritan	_____ %
<u>Large-Cap Value - Equity Fund</u>	
JP Morgan Equity Income Select	_____ %
<u>Social Awareness Fund (Large-Cap Blend)</u>	
Parnassus Core Equity Fund	_____ %
<u>Large-Cap Blend - Equity Fund</u>	
T. Rowe Price U.S. Equity Research	_____ %
<u>Large-Cap Growth - Equity Fund</u>	
Fidelity Contrafund	_____ %
<u>Mid-Cap Value - Equity Fund</u>	
T. Rowe Price Mid-Cap Value	_____ %
<u>Mid-Cap Blend - Equity Fund</u>	
Fidelity Low-Priced Stock	_____ %
<u>Mid-Cap Growth - Equity Fund</u>	
Goldman Sachs Small/Mid Cap Growth R6	_____ %
<u>Small-Cap Blend - Equity Fund</u>	
Loomis Sayles Small Cap Value Inst	_____ %
<u>International - Equity Fund</u>	
American Funds EuroPacific Growth R6	_____ %

Life-Cycle Funds		
<u>Life-Cycle Funds</u>	<u>Fidelity Freedom Funds</u>	New %
	Fidelity Freedom Income K6	_____ %
	Fidelity Freedom 2010 K6	_____ %
	Fidelity Freedom 2015 K6	_____ %
	Fidelity Freedom 2020 K6	_____ %
	Fidelity Freedom 2025 K6	_____ %
	Fidelity Freedom 2030 K6	_____ %
	Fidelity Freedom 2035 K6	_____ %
	Fidelity Freedom 2040 K6	_____ %
	Fidelity Freedom 2045 K6	_____ %
	Fidelity Freedom 2050 K6	_____ %
	Fidelity Freedom 2055 K6	_____ %
	Fidelity Freedom 2060 K6	_____ %
	Fidelity Freedom 2065 K6	_____ %

Index Funds	
<u>Bond Index Fund</u>	
Vanguard Total Bond Market Index I	_____ %
<u>Large Cap Equity Index Fund</u>	
Fidelity 500 Index	_____ %
<u>Mid- and Small Cap Equity Index Fund</u>	
Fidelity Extended Market Index	_____ %
<u>International Equity Index Fund</u>	
Vanguard Total International Stock I	_____ %

Please make sure percentages total 100%

I authorize and direct the Joint Retirement Board of Conservative Judaism (JRB) to make the change(s) to my account as specified on this form. **Please confirm requests made by email** by calling 888-JRB-FREE (572-3733).

Accountholder's Signature

Date