



HOW TO REBALANCE CURRENT INVESTMENT ALLOCATION

STEP 1: Once you log in, click **Manage Investments** under **Manage** on your dashboard.

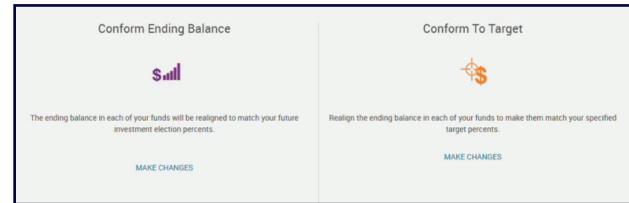


STEP 2: Click on the **Rebalance** option.



STEP 3: Choose one of the following rebalancing methods:

- **Conform to Ending Balance:** Aligns your current balances with the same percentages as your future investment elections.
- **Conform to Target:** Aligns your current balances with your custom-specified target percentages.



STEP 4: Click **Make Changes** under your preferred rebalancing option. Depending on your plan, you may see one or both of these options:

- **Enter target percentages to all sources.**
- **Enter target percentages by source type.**



STEP 5: Enter your desired target percentages for your selected investments. **Ensure your allocations add up to 100%.**



STEP 6: Review your changes. Click **Submit** to finalized your rebalancing request. Once you see the confirmation number, your rebalancing request will process at the next closest business day.

