

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

Stable Value New %

Stable Value Interest Fund _____ %

Bond Funds

Vanguard Inflation-Protected Secs I _____ %

Goldman Sachs US Mortgages R6 _____ %

Fidelity Adv Strategic Income Z _____ %

Hybrid (Stocks and Bonds)

Fidelity Puritan K6 _____ %

Large-Cap Value - Equity Fund

JP Morgan Equity Income R6 _____ %

Social Awareness Fund (Large-Cap Blend)

Parnassus Core Equity Fund _____ %

Large-Cap Blend - Equity Fund

T. Rowe Price U.S. Equity Research I _____ %

Large-Cap Growth - Equity Fund

Fidelity Contrafund K6 _____ %

Mid-Cap Value - Equity Fund

T. Rowe Price Mid-Cap Value I _____ %

Mid-Cap Blend - Equity Fund

Fidelity Low-Priced Stock K6 _____ %

Mid-Cap Growth - Equity Fund

Goldman Sachs Small/Mid Cap Growth R6 _____ %

Small-Cap Blend - Equity Fund

Loomis Sayles Small Cap Value N _____ %

International - Equity Fund

American Funds EuroPacific Growth R6 _____ %

Life-Cycle Funds

Life-Cycle Funds

Fidelity Freedom Funds 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

Bond Index Fund

Vanguard Total Bond Market Index I _____ %

Large Cap Equity Index Fund

Fidelity 500 Index _____ %

Mid- and Small Cap Equity Index Fund

Fidelity Extended Market Index _____ %

International Equity Index Fund

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