AGFinancial

INVESTMENT CHANGE

Complete to change investment allocations for current participants.

1 PARTICIPANT INFORMATION

Full Legal Name | Date of Birth | Social Security Number

2 PLAN INFORMATION

Select all that apply.

- ☐ All of my retirement accounts with AGFinancial
- ☐ 403(b)
- ☐ Employer Plan (*AGFinancial serves as administrator*)
- ☐ Pre-2005 Deferred Compensation (*Rabbi Trust*)
- ☐ 409A Deferred Compensation

3 CONTRIBUTION TYPE

Select one.

- ☐ All contribution types
- ☐ Employer Contributions
- ☐ Employee Roth Contributions
- ☐ Rollover/Transfer
- ☐ Employee Pre-tax Deferral
- ☐ After-tax Contributions

4 RETIREMENT INVESTMENT ELECTIONS

Select one track and if applicable, select a strategy within that track. Investment elections must be in increments of 1%. Contributions are posted three times a week and invested according to your most recent election on file. If no selection is indicated, the default investment is the MBA Income Fund. If the total allocation does not equal 100%, the remainder will be allocated to the MBA Income Fund. Fund prospectuses/descriptors are available at www.agfinancial.org/retirement. *Investment options continued on next page.*

☐ TRACK 1: MBA INCOME FUND

The MBA Income Fund pays a fixed rate that is declared quarterly with interest compounding monthly. Your investment in this fund is used to provide loans to build churches and ministry facilities across the country.

☐ TRACK 2: RISK-BASED STRATEGIES

Pre-mixed strategies are based on levels of risk tolerance and create a diversified portfolio with one investment choice.

SCREENED INVESTMENTS

- ☐ Steward Conservative Strategy (20% Stocks/80% Bonds)
- ☐ Steward Moderate Strategy (40% Stocks/60% Bonds)
- ☐ Steward Balanced Strategy (60% Stocks/40% Bonds)
- ☐ Steward Aggressive Growth Strategy (80% Stocks/20% Bonds)
- ☐ Steward Diversified Equity Strategy (100% Stocks)

NON-SCREENED INVESTMENTS

- ☐ Fidelity® Asset Manager 40%
- ☐ Fidelity® Asset Manager 60%
- ☐ Fidelity® Asset Manager 85%

☐ TRACK 3: TARGET-DATE STRATEGIES

Target-date investments allow you to choose a strategy based on your targeted date of retirement. These screened strategies automatically adjust to become more conservative as your targeted date approaches.

- ☐ Steward 2020 Strategy
- ☐ Steward 2030 Strategy
- ☐ Steward 2040 Strategy
- ☐ Steward 2050 Strategy

☐ TRACK 4: INDIVIDUAL INVESTMENTS

This track allows you to custom build your portfolio.

SCREENED INVESTMENTS

____% MBA Income Fund
____% Steward Select Bond Fund
____% Steward Equity Market Neutral Fund
____% Steward Small-Cap Growth Fund
____% Steward Global Equity Fund
____% Steward Covered Call Income Fund
____% Steward Large Cap Core Fund
____% Steward Large Cap Growth Fund
____% Steward Large Cap Value Fund
____% Steward International Enhanced Index Fund
____% Steward Values-Focused Large Cap Enhanced Index Fund
____% Steward Values-Focused Small-Mid Cap Enhanced Index Fund
____% Steward Diversified Equity Strategy

NON-SCREENED INVESTMENTS

____% Fidelity® 500 Index Fund
____% Fidelity® Small Cap Index Fund
____% Fidelity® International Index Fund
____% Fidelity® NASDAQ Composite Index Fund
____% Vanguard Mid-Cap Index Fund
____% Vanguard Total World Stock Index Fund
____% Vanguard Total Bond Market Index Fund
____% Vanguard Real Estate Index Fund
____% JPMorgan Hedged Equity 3 Fund

5 SIGNATURE

I hereby request the investment changes made above and understand that my investments will be allocated as elected until such time as I make any future changes.

APPLY INVESTMENT CHANGES

☐ All contributions (*both future contributions and current balances*)
☐ Future contributions only
☐ Existing balance only

Participant Signature Printed Name Date

IMPORTANT INFORMATION

- Requests received by 12:00 p.m. CT will be processed the same day. Requests received after 12:00 p.m. are generally processed the next business day. Incomplete forms may result in processing delays.
- Access your retirement account online at www.agfinancial.org. Online changes completed before 3:00 p.m. CT on trading days will be processed the same day. All other changes are generally processed the next trading day.
- Changes are available for online viewing the next business day after processing.