



MODEL CHANGE FORM

In order to make any changes to the investment model(s) for your Plan complete and return this form to support@rpgconsultants.com. The signature of a Plan Trustee or 3(38) Fiduciary is not required. (†) If you wish to add or remove an investment outside of the model(s) please also complete the Investment Change Form, which requires the signature of a Plan Trustee or 3(38) Fiduciary and a 30-day notification to Plan Participants. RPG will prescreen all incoming investments and will report any fund restrictions that may prohibit smooth operation. RPG does not guarantee the results of investment screenings. In some instances, additional fund company and/or custodial paperwork is required to be completed by the Plan Advisor or 3(38) Fiduciary. When determining the desired effective date for a model change that does not involve adding or removing an investment outside of the model(s), please allow at least 10 business days from the time this form is submitted in good order. If this model change is being done in conjunction with an investment addition or removal outside of the model(s) which requires a 30-day Participant notification, please allow at least 45 days from the time that this form and the completed investment change form are submitted in good order. Please enter the desired effective date for the model changes below (must be a specific date; “ASAP” will not be accepted):

<input type="checkbox"/> Apply change to all my Plans	<input type="checkbox"/> Apply change to the following Plan only:		Effective Date:	
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Symbol	Investment Name	Conservative	Moderately Conservative	Moderate	Moderately Aggressive	Aggressive	Equity Preference	Add Fund (if applicable)	Remove Fund (if applicable)	Available Outside of Model? See (†) above
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No
		%	%	%	%	%	%	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	No

I authorize the above model changes and acknowledge that model updates can take up to 10 business days to initiate and complete.