



MODEL CHANGE FORM

To make a change to the makeup of the investment models in your Plan(s), complete and return this form to RPG. The signature of a Plan Trustee or 3(38) Fiduciary is not required. **(*)** If you wish to add or remove an investment offered outside of the models in the Plan, 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, completion of additional fund company and/or custodial paperwork is 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 models, 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):

☐ Apply change to all my Plans ☐ Apply change to the following Plan only:								Effective Date:		
Symbol	Investment Name	Conservative Model	Moderately Conservative Model	Moderate Model	Moderately Aggressive Model	Aggressive Model	Very Aggressive Model	Add Fund (If applicable)	Remove Fund (If applicable)	Available Outside of Model? See (*) above
								☐ Add	☐ Remove	☐ Yes / ☐ No
								☐ Add	☐ Remove	☐ Yes / ☐ No
								☐ Add	☐ Remove	☐ Yes / ☐ No
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								☐ Add	☐ Remove	☐ Yes / ☐ No
								☐ Add	☐ Remove	☐ Yes / ☐ No
								☐ Add	☐ Remove	☐ Yes / ☐ No

☐ I authorize the above model changes and acknowledge that model updates may take up to 10 business days to complete (45 business days if part of a Plan investment change).

Date

Name (Please Print)

Signature

[05/2023]