CHURCH BENEFITS BOARD
A MINISTRY OF THE COOPERATIVE BAPTIST FELLOWSHIP
Your benefits are our ministry.

Investing Form
CBF 403(b) Plan

YOUR INFORMATION

Social Security Number		Last Name		First Name
Mailing Address		City/State/Zip		
Date of Birth (mm/dd/yy)	Date of Hire (mm/dd/yy)	Phone#	Email address	

WHERE DO YOU WANT TO INVEST YOUR SAVINGS

The Church Benefits Board can help you manage your investments when you select a Guided Portfolio or you may also create your own Independent Portfolio. If you do not indicate where to invest your savings, your assets will be placed in the plan's default fund(s). The decisions you make regarding your investments will stay in effect until you modify them via The Standard's Web site at (**http://retirement.standard.com**) or via INFOLINE (**800.858.5420**). ***Select only one box*** of the Guided Portfolios below, OR select your own investments by entering whole percentages in the "**Independent**" column. Be sure that your selections total 100% and that the minimum any investment is 1%. This investing Form is to be used ONLY by eligible plan participants. To make changes to your current investment directive, visit (**http://retirement.standard.com**) or via INFOLINE (**800.858.5420**).

		Choose ONE Guided Portfolio OR create your Independent Portfolio					
Fund Name	**Style**	☐ Conservative	☐ Moderately Conservative	☐ Moderate	☐ Moderately Aggressive	☐ Aggressive	☐ **Independent**
Cash Equivalent		**30%**	**20%**	**10%**	**0%**	**0%**	
The Standard Stable Asset A	Stable Value	30%	20%	10%	0%	0%	%
Bonds		**50%**	**40%**	**30%**	**20%**	**0%**	
Metropolitan West TotRe Bd I	Intermed-term Bond	50%	40%	30%	20%	0%	%
Vanguard Inflat Prot Sec Adm	Intermed-term Bond	0%	0%	0%	0%	0%	%
Equities							
Large Cap Stock		**13%**	**26%**	**39%**	**52%**	**65%**	
Vanguard 500 Index Signal	Larger	7%	13%	19%	26%	33%	%
JPMorgan Large Cap Grwth R6	Larger Growth	3%	7%	10%	13%	16%	%
Vanguard Windsor II Admiral	Larger Value	3%	6%	10%	13%	16%	%
Neuberger Berman Soc Res Inv	Larger Blend	0%	0%	0%	0%	0%	%
Mid/Small Cap Stock		**4%**	**8%**	**12%**	**16%**	**20%**	
Neuberger Berman Md Cp Gr Inv	Mid-Cap Growth	1%	2%	3%	4%	5%	%
Columbia Mid Cap Val Opp R4	Mid-Cap Value	1%	2%	3%	4%	5%	%
Columbia Small Cap Value II Z	Small Value	2%	4%	6%	8%	10%	%
Alger Small Cap Growth Institutional	Small Growth	0%	0%	0%	0%	0%	%
International Stock		**3%**	**6%**	**9%**	**12%**	**15%**	
Thornburg International Value R5	Foreign Stock	3%	6%	9%	12%	15%	%
Other							
DFA Emerging Mrkts Core Eq I	Diversified EmergMrkts	0%	0%	0%	0%	0%	%
Vanguard Wellington Inv	Mod Allocation	0%	0%	0%	0%	0%	%
Vanguard Balanced Indx Signl	Mod Allocation	0%	0%	0%	0%	0%	%
	Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

AUTOMATIC REBALANCER

Check a box below to select the Automatic Rebalancer service for your Plan account. If you select this service, your account assets will be rebalanced to match your investment directives at the time of rebalancing. Automatic Rebalancer will remain off if you do not make a selection below.

How often would you like your account rebalanced? ☐ **Quarterly** ☐ **Semiannually** ☐ **Annually**

AUTHORIZATION

I authorize my employer and the plan administrator to invest my savings as outlined on this form. I also direct my employer and the plan administrator to implement any other instructions I have provided on this form. I have read the Disclosure Statement on this form and, by signing here, I agree to be bound by its terms. The employer, trustees and any others concerned with the administration of the Plan are entitled to rely on these instructions; each shall be fully protected in taking or omitting any action under any provisions of the Plan in reliance on this information.

Participant Signature	Date

Disclosure Statement: You must notify The Standard within 15 days of receipt of your quarterly account statement if an error occurred, or if you requested and confirmed an investment transfer or directive change that was not completed during the period covered by the statement. You may give notice by contacting a customer service representative at **800.858.5420** or by e-mailing **savings@standard.com**. Unless you give such notice, The Standard will not be liable for any resulting loss to your account. In any case, The Standard will not be liable if circumstances beyond its control prevent the transaction, or if its liability is otherwise limited by regulation or agreement.

Please keep a copy of this form for your records and return the original to:

Church Benefits Board, 2930 Flowers Road, Suite 133A, Atlanta, GA 30341 Phone: (800) 352-8741 Fax: (770) 220-1661