

Lincoln Public Schools Elective 403(b) Retirement Plan

Enrollment / Investment Election Form

- New Enrollment** (Boxes A-D)
 Change 403(b) Contribution (Boxes A and C)
 Exchange (Boxes A, B, and D)
 Change Name (Box A)
 Change Investment Direction (Boxes A and D)
 Change Address (Boxes A and B)
 Rollover Contribution (Boxes A, B, and D)

Box A	
First Name: _____	M.I. _____
Last Name: _____	
Soc. Sec. Number: _____	
Date of Birth: _____	Date of Hire: _____

Box B	
Address: _____	
City, State Zip: _____	
Phone: (____) _____	
Email Address: _____	

Box C	
403(b) Contribution:	
I hereby authorize the company to deduct from my compensation as defined by the Plan the following dollar amount or percentage. Changes, if made by the 15th of the month, will be effective at the end of that month.	
Traditional 403(b) Contribution (Pre-Tax):	
\$ _____ or _____%	
Roth 403(b) Contribution (After-Tax):	
\$ _____ or _____%	
2012 403(b) Limit:	\$17,000
2012 403(b) Limit with Catch-Up:	\$22,500

Box D	
Direction of Investment	
1. Select one or both boxes as appropriate. If no box is checked, current balances and future contributions will be changed.	
<input type="checkbox"/> <i>Realign Current Balance</i> <input type="checkbox"/> <i>Change Future Contributions</i>	
This "Direction of Investment" directs current balances and future contributions as specified above. Investment elections will be processed within 10 business days of receipt.	
2. Enter elections in 1% increments. Must total 100%. If nothing is elected, 100% will default into the age applicable Lifecycle Fund based on your normal retirement age under the Plan.	
<u>Lifecycle Funds</u>	
Vanguard Target Retirement Income	(VTINX) _____%
Vanguard Target Retirement 2015	(VTXVX) _____%
Vanguard Target Retirement 2020	(VTWNX) _____%
Vanguard Target Retirement 2025	(VTTVX) _____%
Vanguard Target Retirement 2030	(VTHRX) _____%
Vanguard Target Retirement 2035	(VTTHX) _____%
Vanguard Target Retirement 2040	(VFORX) _____%
Vanguard Target Retirement 2045	(VTIVX) _____%
Vanguard Target Retirement 2050	(VFIFX) _____%
Vanguard Target Retirement 2055	(VFFVX) _____%
<u>Participant Managed Funds</u>	
Goldman Sachs Financial Square Gov't	(FGTXX) _____%
Goldman Sachs Short Duration	(GSTGX) _____%
AF Bond Fund of America (R5)	(RBFGX) _____%
Vanguard Inflation Protected Securities	(VIPSX) _____%
MFS Value	(MEIJX) _____%
AF Washington Mutual	(RWMGX) _____%
AF Investment Company of America	(RICGX) _____%
Vanguard 500 Index	(VIFSX) _____%
AF Growth Fund of America	(RGAGX) _____%
Vanguard Morgan Growth Adm	(VMRAX) _____%
Goldman Sachs Mid Cap Value	(GSMCX) _____%
JP Morgan Market Expansion Index	(PGMIX) _____%
Allianz RCM Mid-Cap Instl	(DRMCX) _____%
Columbia Acorn	(ACRNX) _____%
Vanguard Small Cap Value Index	(VISVX) _____%
Vanguard Small Cap Index	(VSISX) _____%
Loomis Sayles Small Cap Growth	(LSSIX) _____%
Templeton Foreign Equity	(TFEQX) _____%
AF EuroPacific Growth	(REGX) _____%
Thornburg International Value	(TIVRX) _____%
Lazard Emerging Markets Equity	(LZEMX) _____%
TOTAL	_____ 100%

Mail the completed form to: **Union Bank & Trust Company • Retirement Plan Services • 6811 S. 27th Street • Lincoln, NE 68512**
 For questions contact: **Kellee Krick** (402) 323-1467 or kellee.krick@ubt.com

Signature

Date