

Investment Change



Skip this form! Log in at hraveba.org and submit your investment change online.

Submitting online is quicker and a more secure way to protect your information!

Completed paper forms may also be submitted to: forms@hraveba.org | HRA VEBA Plan, PO Box 80587, Seattle, WA 98108

1 PARTICIPANT ACCOUNT AND CONTACT INFORMATION

If you have more than one participant account, enter the participant account number of the account to which you want your revised investment allocations to apply. Otherwise, your investment allocation changes below will be applied uniformly to all of your accounts.

ACCOUNT NUMBER or SSN _____ DATE OF BIRTH mm / dd / yyyy _____

PARTICIPANT LAST NAME _____ FIRST NAME _____ M.I. _____

MAILING ADDRESS _____ CITY _____ STATE _____ ZIP _____

AREA CODE and PHONE NUMBER _____ EMAIL ADDRESS (use home or personal email address) _____

Today's Date: _____

2 INVESTMENT ALLOCATION CHANGE

Select and complete **OPTION A** or **OPTION B**, but not both. You should carefully read the **Investment Fund Information** brochure available at hraveba.org or upon request from the customer care center.

OPTION A: Choose a pre-mix

Select and complete this option if you want your asset allocation portfolio designed and managed by professionals. **Choose only one pre-mix.** If you select multiple funds your entire account will be invested in the most conservative fund selected. Read the **Investment Fund Information** brochure available online at hraveba.org for more information.

The pre-mixed asset allocation portfolios are managed to stay on their respective target allocations. Each fund maintains its growth- or income-oriented asset mix; you never have to rebalance to keep your selected strategy on track.

Fund Name	Risk	Target Allocation
<input type="checkbox"/> Vanguard LifeStrategy® Income	Low-to-moderate	80% bonds; 20% stocks
<input type="checkbox"/> Vanguard LifeStrategy® Conservative Growth	Moderate	60% bonds, 40% stocks
<input type="checkbox"/> Vanguard LifeStrategy® Moderate Growth	Moderate-to-high	40% bonds, 60% stocks
<input type="checkbox"/> Vanguard LifeStrategy® Growth	High	20% bonds, 80% stocks

OPTION B: Do-it-yourself

Select and complete this option if you want to build your own portfolio. **Enter only whole numbers—no fractions. Your allocation must equal 100%.** Allocations that are not whole numbers will be rounded to the nearest whole number. Generally, if your allocation exceeds 100%, the excess will be subtracted from your least conservative fund choice. If your allocation is less than 100%, the shortage will be added to your most conservative fund choice.

Rebalance my allocation percentages:

Quarterly **Annually** (end of each calendar quarter/year)

Rebalancing is an important feature that will redistribute your entire account balance according to your most recent allocation percentages on file. If selected, this option will continue until revoked online or via written notice to the Plan.

Asset Class / Fund Name	Allocation %
Stable Value / HRA VEBA Stable Value	_____ %
Total Return Bond / Metropolitan West Total Return Bond	_____ %
Balanced / Vanguard Balanced Index	_____ %
Large Cap Equity / Vanguard Institutional Index (S&P 500)	_____ %
Mid Cap Equity / Scout Mid Cap	_____ %
Small Cap Equity / Champlain Small Company	_____ %
International Equity / American Funds EuroPacific Growth	_____ %
Total Must Equal 100% ▶	_____ %

3 IMPORTANT: READ BEFORE SUBMITTING

After submitting this form, please login to your account (and click on Investments on the main menu) to check that your elections have been applied to your balance and future contributions as you intended. If you find an error or problem, you must contact us at the mailing address, email address, or phone number shown on this form within 90 days after you first view an error or problem online or receive the first statement on which an error or problem appeared, whichever occurs first. If we do not hear from you within 90 days, the account will be considered correct.

By submitting this form, you agree to the Terms and Conditions of the Plan, which are located in the Plan Summary. For a copy of the Plan Summary, please log into your account at hraveba.org or contact our customer care center at 1-888-659-8828.