ENROLLMENT/CHANGE INVESTMENT ELECTION FORM

Plan Name: School Association for Special Education in DuPage County 403(b) Plan

Location Name: _____ Location ID: _____ Ref. No. 9026

How To

☐ **To Enroll:** Complete All Sections
(Plan Sponsor: Send to CPI if checked.)

☐ **To Decline Enrollment:** Complete Sections A,C and D
(Plan Sponsor: Keep for your records if checked. Do not send to CPI.)

☐ **To Change Contribution Percentage:** Complete Sections A, C and D
(Plan Sponsor: Keep for your records if checked. Do not send to CPI.)

☐ **To Change Investment Direction:** Do not complete this form. Go to the web site at www.myretirementfuture.com or call the IVR at 1-800-291-1585. This form can not be used to change your investment election.

Section A Your Info

Please type or print clearly

Last Name _____ First Name _____ M. I. _____ Social Security Number (SSN) ☐☐☐-☐☐-☐☐☐☐

Section B Your Investment Direction *Initial Enrollment Only

I direct that all future contributions be invested in the following funds. (*If incomplete, contributions will be invested in accordance with your prior election or, if none, in the default fund noted with a "D" until a new election is completed through the IVR or web site. Failure to complete this section is deemed to be a 100% election in the default fund.)*

Enter WHOLE percentages in multiples of 1% (i.e. 10%, 25%, 50%). Do not use decimals or fractions. Elections must total 100%.

%		Fund Name	%	Fund Name
	D	Balanced Model		Invesco Capital Development R
		Oppenheimer Real Estate C		Munder Index 500 R
		Franklin Natural Resources C		American Century Mid Cap Value R
		Oppenheimer Gold & Special Minerals C		Federated Kaufmann Small Cap K
		Templeton Developing Markets Trust R		Oppenheimer Small & Mid Cap Value C
		American Smallcap World R2		American Intermediate Bond Fund of America R2
		American EuroPacific Growth R2		American High Income Trust R2
		American Capital World Growth & Income R2		Oppenheimer Main Street Opportunity C
		Oppenheimer Quest International Value C		Conservative Model
		American Growth Fund of America R2		Growth Model
		Franklin Small Cap Value R		AllianceBernstein Global Thematic Growth R
		American Fundamental Investors R2		Franklin DynaTech R
		American Bond Fund of America R2		American Funds Money Market Fund-R2
		Oppenheimer Equity Income C		
			100%	**Fund elections MUST TOTAL 100%**

**This election applies to new contributions only and will not affect the investment of existing assets or assets that are "mapped" during a conversion from a prior record keeper.*

Paper copies of this Enrollment/Change Investment Election Form will not be accepted after initial enrollment in the plan. All subsequent transactions must be made through the Web Site or the IVR.

Section C Your Election

☐ **Salary Deferral** - I instruct my employer to deduct _____% of my pay on a pre-tax basis each pay period for investment in my account.
(In the space provided, enter a whole percentage in an amount permitted by the Plan, as described in the Plan Highlights.) To decline participation, enter 0%.

☐ **Roth Contribution** - I instruct my employer to deduct _____% of my pay on an after-tax basis each pay period for investment into the designated Roth portion of my account.

Please refer to your Summary Plan Description (SPD) and Plan Highlights, which will describe any maximum limits on the amount you may contribute that apply to your plan either based on the plan's provisions or under the law. Your employer may restrict the frequency with which you may change this election. Please check with your Plan Representative to see if there are any restrictions.

Section D Sign

Note: Participants should visit the plan website (www.myretirementfuture.com) for prospectuses and information about the fund's investment objectives, risks, fees and expenses. Some funds may impose a redemption fee on shares that are transferred or exchanged out of the fund before the applicable minimum holding period. Please read the prospectus for more information about the fund and any applicable redemption fee.

I understand that I can not make any changes to my Investment Direction by using this form. Changes must be made by accessing the Web Site or the IVR.

By signing this form, I have authorized the Employer to deduct the amount elected from my paycheck and transmit the funds to the investment funds indicated. I certify that I have received the prospectuses for the mutual funds I have chosen to invest in above.

_____ Participant

_____ Date