

**BUSINESS ADVISORY SOLUTIONS, LLC RETIREMENT SAVINGS PLAN**

**INVESTMENT ALLOCATION / CHANGE OF INVESTMENT FORM**

**1. Employee Information**

Employee Name \_\_\_\_\_

Social Sec. # \_\_\_\_\_

**2. Purpose of Form (Choose one)**

New - Initial Allocation  
*(Attach Enrollment Form)*

Change Requested  
*☞ Also available online at [www.retirementvista.com](http://www.retirementvista.com)*

**3. Master Account Investment Allocation**

- ◆ I understand that funds received into my account with an incomplete Investment Allocation Form on file will default to the 'Russell Lifepoint Moderate Strategy Fund'
- ◆ If no change is desired in your current account (existing balances), do NOT complete Column A
- ◆ New Participants complete Column B only
- ◆ Complete **both** Column A and B if you want your existing balances and future contributions changed

☞ *Use Whole percentages only*

**Column A**  
To Change  
Existing Account  
Balances  
Only

**Column B**  
For New Enrollees or to  
Change Future Payroll  
Contribution  
Allocation %'s Only

CLASSIFICATION	SYMBOL	MUTUAL FUND NAME	_____ %	_____ %
International Equity	SWOIX	Laudus International Market Masters	_____ %	_____ %
International Equity	OAKIX	Oakmark International	_____ %	_____ %
Emerging Markets Equity	LZOEX	Driehaus Emerging Mkts Growth	_____ %	_____ %
Aggressive Growth	PGOAX	Jennison Small Company A	_____ %	_____ %
Aggressive Growth	BARAX	Baron Asset	_____ %	_____ %
Small Company	TSVOX	Constellation TIP Small Cap Value Opp	_____ %	_____ %
Growth	JAGIX	Janus Growth & Income	_____ %	_____ %
Value	GCMAX	Goldman Sachs Mid Cap Value A	_____ %	_____ %
Value	AAGPX	American Beacon Large Cap VI Pln	_____ %	_____ %
Growth & Income	UMBIX	Excelsior Value & Restructuring	_____ %	_____ %
Index	SWINX	Schwab International Index	_____ %	_____ %
Index	DISSX	Dreyfus Small Cap Stock Index	_____ %	_____ %
Index	PESPX	Dreyfus Mid-Cap Index	_____ %	_____ %
Index	ISLCX	Schwab Instl Sel S&P 500	_____ %	_____ %
Specialty - Real Estate	CSRSX	Cohen & Steers Realty Shares	_____ %	_____ %
Fixed Income - Corp	LSBRX	Loomis Sayles Bond Ret	_____ %	_____ %
Fixed Income - Corp	PTTDX	PIMCO Total Return D	_____ %	_____ %
Fixed Income - Govt	STVSX	WF Adv Government Securities	_____ %	_____ %
Fixed Income - Govt	BGNMX	American Century GNMA	_____ %	_____ %
Money Market	SIC1Z	Gartmore Morley Stable Value Fund	_____ %	_____ %
Money Market	SWRXX	Schwab Investor Money Fund	_____ %	_____ %
CLASSIFICATION	SYMBOL	RUSSELL LIFEPOINT PORTFOLIOS	_____ %	_____ %
Most Aggressive	RELEX	Russell Lifepoint Equity Aggressive Strategy	_____ %	_____ %
Moderately Aggressive	RALEX	Russell Lifepoint Aggressive Strategy	_____ %	_____ %
Balanced	RBLEX	Russell Lifepoint Balanced Strategy	_____ %	_____ %
Moderate	RMLEX	Russell Lifepoint Moderate Strategy	_____ %	_____ %
Conservative	RCLEX	Russell Lifepoint Conservative Strategy	_____ %	_____ %

**TOTAL (must equal 100% for each column used)**

**100 %**

**100 %**

**4. Authorization (Required)**

**I have elected the investment choices above for the investment of my account balances. I understand there may be advisory and/or transaction fees charged to my account.**

Signature *(Employee/Participant)* \_\_\_\_\_

Date \_\_\_\_\_