

# Investment Allocation Change

Mennonite Retirement Trust

**Mennonite  
Retirement  
Trust**

To make investment allocation changes, access your MRT account online at [myeverence.com/MRT](http://myeverence.com/MRT), or complete all the information on this form, sign and mail to Empower Retirement, P.O. Box 173764, Denver, CO 80217-3764, or fax to (866) 745-5766.

Group name \_\_\_\_\_ Group number \_\_\_\_\_

## Participant information

\_\_\_\_\_  
Last name First name Middle Social Security number

## Investment allocation changes

I want to change my investment allocations for:  future contributions only  
 existing balance only  
 both future contributions and existing balance

Investment option name	Investment option code	Percentage	Investment option name	Investment option code	Percentage
Aggressive Allocation*	MENAGG	_____	MRT – Parnassus Mid Cap Inst.	MEN-F1	_____
Moderate Allocation*	MENMOD	_____	MRT – Praxis Small Cap Index Fund*	MEN-SC	_____
Conservative Allocation*	MENCON	_____	MRT – Vanguard Small Cap Index Admiral	MENVG2	_____
MRT – Vanguard LifeStrategy Growth Inv	MENVG5	_____	MRT – Vanguard Mid Cap Index Admiral	MEN-F2	_____
MRT – Vanguard LifeStrategy Income Inv	MENVG6	_____	MRT – Parnassus Core Equity Inst Cl*	MEN-EI	_____
MRT – Vanguard LifeStrategy Moderate Gro	MENVG7	_____	MRT – Pax ESG Beta Quality Fund*	MEN-WG	_____
Target Date 2020*	MENT20	_____	MRT – Praxis Growth Index*	MEN-GI	_____
Target Date 2030*	MENT30	_____	MRT – Praxis Value Index*	MEN-VI	_____
Target Date 2040*	MENT40	_____	MRT – TIAA-CREF Social Choice*	MEN-SO	_____
Target Date 2050*	MENT50	_____	MRT – Vanguard 500 Index Admiral	MENVG1	_____
MRT – Pax MSCI Intl ESG Index Fund*	MEN-PM	_____	MRT – Cohen & Steers Real Estate Sec I	MEN-F5	_____
MRT – Praxis International Index*	MEN-IT	_____	MRT – Praxis Impact Bond Fund*	MEN-IC	_____
MRT – American Funds Europacific Growth R6	MEN-F3	_____	MRT – Vanguard GNMA Admiral	MEN-VG	_____
MRT – DFA Emerging Markets Core Equity I	MEN-F4	_____	MRT – Vanguard Total Bond Market Idx Adm	MENVG4	_____
MRT – Vanguard Total Intl Stock Idx Adm	MENVG3	_____	Guaranteed Interest Fund	GWGIFM	_____

**Must indicate whole percentages** = 100%

\*These funds are screened according to socially responsible criteria.

## Signature

I authorize the above changes to be made to my Mennonite Retirement Trust account.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date