

# 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), call Empower Retirement at 800-298-4801 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. We encourage you to verify the changes you requested were made properly.

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 Portfolio*	MENAGG	_____	MRT – Parnassus Mid Cap Inst.	MEN-F1	_____
Moderate Portfolio*	MENMOD	_____	MRT – Praxis Small Cap Index Fund*	MEN-SC	_____
Conservative Portfolio*	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	_____
Target Date 2060*	MENT50	_____	MRT – Cohen & Steers Real Estate Sec I	MEN-F5	_____
MRT – Pax MSCI Intl ESG Index Fund*	MEN-PM	_____	MRT – Praxis Impact Bond Fund*	MEN-IC	_____
MRT – Praxis International Index*	MEN-IT	_____	MRT – Vanguard GNMA Admiral	MEN-VG	_____
MRT – American Funds Europacific Growth R6	MEN-F3	_____	MRT – Vanguard Total Bond Market Idx Adm	MENVG4	_____
MRT – DFA Emerging Markets Core Equity I	MEN-F4	_____	Guaranteed Interest Fund	GWGIFM	_____
MRT – Vanguard Total Intl Stock Idx Adm	MENVG3	_____			
			<b>Must indicate whole percentages</b>		<b>= 100%</b>

\*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

Mennonite Retirement Trust is sponsored by Mennonite Church USA and is available to other Anabaptist congregations and organizations. It is administered by Everence. MRT and Everence partner with Empower Retirement to provide enhanced account management and retirement planning tools to you and participating employees.

Everence is not affiliated with Empower Retirement.

The MRT Target-Date and Risk-Based portfolios incorporate Everence stewardship investing guidelines. Certain mutual funds available for participant choice were selected for their screens, market coverage and performance characteristics, but are not aligned with Everence stewardship investing guidelines. Please see the description of each fund for a more detailed description of fund characteristics.

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