

# Cedar Rapids Investment Change/Transfer Form

## Section A: General Information

Employer (District) Name:			
Employee Name:		Social Security Number:	
Address:		City:	State: Zip:
Telephone Number:	Fax Number:	E-mail Address:	

## Section B: Investment Election for Future Contributions

### AMERICAN UNITED LIFE INSURANCE COMPANY INVESTMENT OPTIONS: (totals must equal 100%)

#### Fixed Interest / Cash

- \_\_\_\_% AUL Fixed Interest Account
- \_\_\_\_% Goldman Sachs MM Gov Res

#### Intermediate Term Bond

- \_\_\_\_% Pioneer Bond A  
(Intermediate Investment Grade)

#### Large-Cap Stocks: Large Cap Value

- \_\_\_\_% American Century Equity Income

#### Large-Cap Stocks: Large Cap Blend

- \_\_\_\_% American Century Equity Growth
- \_\_\_\_% SSgA S&P 500 Index

#### Large-Cap Stocks: Large Cap Growth

- \_\_\_\_% Alger Capital Appreciation

#### Mid-Cap Stocks: Mid Cap Value

- \_\_\_\_% Goldman Sachs Mid Cap Value

#### Mid-Cap Stocks: Mid Cap Blend

- \_\_\_\_% SSgA S&P Mid-Cap 400 Index

#### Small-Cap Stocks: Small Cap Value

- \_\_\_\_% American Century Small Cap Value

#### Small-Cap Stocks: Small Cap Blend

- \_\_\_\_% Oppenheimer Main Street Small & Mid Cap
- \_\_\_\_% SSgA Russell Small cap Index Strategy

#### International Stocks: Foreign Large Blend

- \_\_\_\_% American Funds Europacific Growth

#### International Stocks: World Stock

- \_\_\_\_% Oppenheimer Global

#### Managed Asset Allocation: Mgd Asset Allocation

- \_\_\_\_% Franklin Income
- \_\_\_\_% Janus Balanced R/ Balanced (JB)
- \_\_\_\_% American Funds American Balanced
- \_\_\_\_% AmCent Strategy Allocation – Allocation: Aggressive

*If no allocations are indicated or the total allocation percentages do not equal 100%, the total Purchase Payment(s) will be allocated to the Plan's default investment pending allocation instructions from the Owner.*

Please indicate in the space provided below to which class(es) of money you wish to apply the investment allocation change. F or more information on your Plan's classes or in which class(es) you have an account balance, please refer to your Plan Highlights and account statement.

I wish to apply the investment allocation change to the following Class(es):

\_\_\_\_ All Classes

\_\_\_\_\_ (please write in the Class Name)

\_\_\_\_\_ (please write in the Class Name)

\_\_\_\_\_ (please write in the Class Name)

\_\_\_\_\_ (please write in the Class Name)

**Section C: Investment Election for Existing Funds**

**AMERICAN UNITED LIFE INSURANCE COMPANY INVESTMENT OPTIONS: (totals must equal 100%)**

Fixed Interest / Cash  
 \_\_\_\_\_% AUL Fixed Interest Account  
 \_\_\_\_\_% Goldman Sachs MM Gov Res

Intermediate Term Bond  
 \_\_\_\_\_% Pioneer Bond A  
 (Intermediate Investment Grade)

Large-Cap Stocks: Large Cap Value  
 \_\_\_\_\_% American Century Equity Income

Large-Cap Stocks: Large Cap Blend  
 \_\_\_\_\_% American Century Equity Growth  
 \_\_\_\_\_% SSgA S&P 500 Index

Large-Cap Stocks: Large Cap Growth  
 \_\_\_\_\_% Alger Capital Appreciation

Mid-Cap Stocks: Mid Cap Value  
 \_\_\_\_\_% Goldman Sachs Mid Cap Value

Mid-Cap Stocks: Mid Cap Blend  
 \_\_\_\_\_% SSgA S&P Mid-Cap 400 Index

Small-Cap Stocks: Small Cap Value  
 \_\_\_\_\_% American Century Small Cap Value

Small-Cap Stocks: Small Cap Blend  
 \_\_\_\_\_% Oppenheimer Main Street Small & Mid Cap  
 \_\_\_\_\_% SSgA Russell Small cap Index Strategy

International Stocks: Foreign Large Blend  
 \_\_\_\_\_% American Funds Europacific Growth

International Stocks: World Stock  
 \_\_\_\_\_% Oppenheimer Global

Managed Asset Allocation: Mgd Asset Allocation  
 \_\_\_\_\_% Russell LifePoints Conservative Strategy  
 \_\_\_\_\_% Janus Balanced R/ Balanced (JB)  
 \_\_\_\_\_% American Funds American Balanced  
 \_\_\_\_\_% AmCent Strategy Allocation – Allocation: Aggressive

*If no allocations are indicated or the total allocation percentages do not equal 100%, the total Purchase Payment(s) will be allocated to the Plan's default investment pending allocation instructions from the Owner.*

Please indicate in the space provided below to which class(es) of money you wish to apply the investment allocation change. For more information on your Plan's classes or in which class(es) you have an account balance, please refer to your Plan Highlights and account statement.

I wish to apply the investment allocation change to the following Class(es):

\_\_\_\_\_ All Classes

\_\_\_\_\_ (please write in the Class Name)

\_\_\_\_\_ (please write in the Class Name)

\_\_\_\_\_ (please write in the Class Name)

\_\_\_\_\_ (please write in the Class Name)

**Section D Internet Access for Plan Participants**

MidAmerica Administrative & Retirement Solutions, LLC provides Internet access for employee transactions, inquiries and questions regarding company retirement plan accounts. Our website address is [www.myMidAmerica.com](http://www.myMidAmerica.com). Live operator assistance is available Monday through Thursday from 8:30 AM to 8:00 PM and Friday 8:30 AM to 6:00 PM Eastern Time at our toll free number (855) 329-0095.

**Section E Participant Certification and Signature**

MidAmerica Administrative & Retirement Solutions, LLC does not and cannot make representations or commitments to employees concerning the investment options for your plan. We simply provide data received from asset custodians as forwarded to our systems. Kindly contact our office directly with your questions or suggestions for continued improvement.

By signature below, I agree that the funds involved and associated financial risks have been described to me such that the allocation selection is based on my best prudent understanding in the interest of my retirement funding goals.

\_\_\_\_\_  
 Employee Signature  
 Please return this completed form to:

\_\_\_\_\_  
 Date

MidAmerica Administrative & Retirement Solutions  
 Attn: ADMIN DEPT  
 2855 Interstate Drive, Suite 115  
 Lakeland, FL 33805  
[planadministration@mymidamerica.com](mailto:planadministration@mymidamerica.com)