

# Investment Directives Form

## Tulalip Tribes of Washington Employees' Retirement Plan - (#222)

Please choose ONE of the pre-mixed portfolios by checking the appropriate box, OR select your own investments by entering whole percentages in the "Independent" column. If there is a change to the underlying funds in a multi-manager account, your initial investment election will be adjusted accordingly. If you are creating your own portfolio, make sure your selections total 100%. This Investment Directives Form is to be used ONLY by newly eligible plan participants. To make changes to your current investment directive, visit [www.invesmart.com](http://www.invesmart.com) or call the Voice Response System at 800.370.9601.

			Choose ONE OR Independent					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fund Name	Style		Conservative	Moderately Conservative	Moderate	Moderately Aggressive	Aggressive	Independent
<b>Cash</b>			<b>30%</b>	<b>20%</b>	<b>10%</b>	<b>0%</b>	<b>0%</b>	
CTAXX	American Funds Cash Mgt Tr A	Money Market	30%	20%	10%	0%	0%	___%
<b>Bonds</b>			<b>50%</b>	<b>40%</b>	<b>30%</b>	<b>20%</b>	<b>0%</b>	
INVFI	Fixed Income Account	Intermediate-term Bond	50%	40%	30%	20%	0%	___%
<b>Equities</b>								
<b>Large Cap Stock</b>			<b>13%</b>	<b>26%</b>	<b>39%</b>	<b>52%</b>	<b>65%</b>	
INVLC	Large Cap Equity Account	Large Blend	13%	26%	39%	52%	65%	___%
<b>Mid/Small Cap Stock</b>			<b>4%</b>	<b>8%</b>	<b>12%</b>	<b>16%</b>	<b>20%</b>	
INVSM	Small/Mid Cap Equity Account	Mid-Cap Blend	4%	8%	12%	16%	20%	___%
<b>International Stock</b>			<b>3%</b>	<b>6%</b>	<b>9%</b>	<b>12%</b>	<b>15%</b>	
INVIE	International Equity Account	Foreign Stock	3%	6%	9%	12%	15%	___%
<b>Total</b>			<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Employee Certification:

By signing this form I certify that:

- 1) I have received the investment information on the investments available in the plan and understand that additional information, including prospectuses, is available on the fund company websites;
- 2) All personal information, including my Social Security number is correct;
- 3) I understand that the pre-mixed portfolios are an aid to assist me in diversifying my retirement plan investments and that I should consider all of my investments when choosing my allocation above; and
- 4) I understand that if I incorrectly select multiple options, or if there is NO investment directive on record, contributions will be placed in the default fund directive.

NOTE: If your plan is currently converting from another provider to The Standard, please review the separate communication regarding how existing asset balances will be transferred.

Signature	Date	Email Address
Printed Name		Social Security Number
Street Address		Date of Birth
City	State	Date of Hire
Zip Code		Mother's Maiden Name