NEWPORT GROUP™

How a Participant Changes Their Investment Selections

A Participant can change their investment allocations for future contributions at any time, by following these steps:

- Log in to your Participant account
- From the **Manage** tab, select the **Manage Investments** option from the drop-down menu
- Under the **Change Elections** section, click **GET STARTED**
- From the available Investment options, enter your desired target percentages in the "New Election %" column – your current investment election percentages will be listed in the "Current Allocation %" column
    - Please note: your new election percentages must sum to 100%
- Click "**NEXT**"
- On the following screen under Transferable Balances, click the "Yes" radio button if you would like to rebalance your transferable balances in your plan to conform with the percentages you entered for your investment elections.**
- Click "**NEXT**"
- On the next screen, review the prospectus for each fund and mark each as read (check the "Mark as Read" for each prospectus you have reviewed, or check "Mark all as Read" for all).
- Click "**NEXT**"
- On the following screen, review your election percentages, then click "**SUBMIT**" to complete your request.
- IMPORTANT: Please note that you will need to obtain a confirmation number to ensure that your request is processed. If you do not receive a confirmation number YOUR REQUEST WILL NOT BE PROCESSED

****Please Note:** Making changes to your Investment Selections will only affect your **Future Contributions**. If you would like to rebalance your entire account to align your exiting balances to your new investment allocation percentages, click the "Yes" radio button. This will initiate trades and change both your future allocations as well as your existing balances.

If you have any additional questions, please contact Newport Group Client Services at 1-888-886-8256 or clientserviceswc@newportgroup.com