

How a Participant Rebalances their Investments

A Participant can rebalance their investment allocations at any time, by following these steps:

- Log in to your Participant account
- From the **My Portfolio tab**, select **Change Investments**
- Under the **Change My Investments** section, click **My Own Investment Choices** and **Continue**
- Choose **Rebalancing**
- From the available Investment options, enter your desired target percentages in the “New Contribution Allocations column – your current investment election percentages will be listed in the “Current Allocations” column
 - o Please note: your new election percentages must sum to 100%
- Choose whether or not you would like the changes to affect future contribution allocations as well as current allocations
- Choose whether or not you would like to set up automatic rebalancing for your new portfolio
- Verify and Submit Changes
- **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**

If you have any additional questions, please contact Newport Group Client Services at 1-888-401-5629.