

1 General Information

Full legal name _____
First Last Middle Initial

Daytime phone (____) _____ SS # _____

E-mail _____

2 Important Investment Information

Timing on investment changes and receipt of forms

- All investment change forms must be received in the AG Financial office **no later than 12:00 PM (noon) Central Time** for the request to change the same day as long as the day is a business day and a day that the stock market is open. In all other cases, the change will occur on the next business/market day.
- Any investment change forms received after noon will be processed as soon as possible but may be done on the next business/market day
- MBA can only make the change if the form is complete. Any problems with the form will delay processing.
- The participant will usually be able to view the investment results on the business day following the day of the trade.
- **You may be able to affect a change yourself as late as 2:00 PM.** Central Time on a business day by logging into your 403(b) SELECT retirement account at www.AGFinancial.org and making the change yourself. You will need your User ID and Password

Basic investment explanations

- Two investment changes per quarter are allowed on any of the options listed below.
- No less than 10% can be invested in one category with increasing increments of 5% allowed.
- If the sum of election choices (in section 5) does not equal 100%, then the remaining percentage shall be allocated to the MBA Income Fund.
- The same investment options are available to all plan and contribution types listed below.

3 Which Plan do you want to Change?

You may designate a different investment choice below for other contributions types in Section 4

- 403(b) SELECT Retirement Plan-**all contributions**
- Employer Plan (if you had a retirement plan with your employer on which MBA assumed administration)
- Deferred Compensation Plan “Rabbi” Trust for contributions received prior to 2005
- 409A** Deferred Compensation Plan “Rabbi” Trust **for** contributions received after 2005

4 Which 403(b) Plan Contribution Type do you want to change?

If you have any questions about these contributions types, please contact the MBA office.

- ALL contribution types
- Employer Contributions
- 403(b) Roth Contributions
- Rollover/Transfer to my 403(b) Retirement Plan
- Employee Pre-tax Deferrals
- After-tax Contributions

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Investment Elections—Please select one of the four following tracks:

Track 1— MBA FIXED INCOME FUND: The MBA Income Fund pays a fixed rate that is declared quarterly with interest compounding monthly. It has had an attractive stable rate of return since inception over 50 years ago. Your investment in this fund is used to build AG churches and ministry facilities across the country. By selecting this option you will be invested 100% in the MBA Fixed Income Fund.

Track 2— INDIVIDUAL INVESTMENT OPTIONS: This option allows you to blend the MBA Income Fund with a stock strategy. Please indicate the allocation for each investment directly below.

Steward Diversified Equity Strategy (100% Stocks)	_____	%
MBA Fixed Income Fund (100% Fixed)	_____	%
Total Allocation	100%	

Track 3—TARGET-DATE STRATEGIES: Target-date investment choices allow you to choose a strategy based on your date of retirement. The Steward Navigator funds help take the emotion out of investing to provide a disciplined approach toward your retirement goals. These strategies automatically adjust to become more conservative as your targeted date of retirement approaches.

- Steward Navigator 2010 Strategy
- Steward Navigator 2020 Strategy
- Steward Navigator 2030 Strategy
- Steward Navigator 2040 Strategy
- Steward Navigator 2050 Strategy

Track 4—RISK-BASED STRATEGIES: These pre-mixed strategies, based on levels of risk tolerance, create a well-diversified portfolio with one investment choice. The Steward strategies offer a fully-screened enhanced index investment approach. The Russell strategies offer a non-screened active manager investment approach.

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| <ul style="list-style-type: none"> <input type="checkbox"/> Steward Conservative Strategy (20% Stocks/80% Bonds) <input type="checkbox"/> Steward Moderate Strategy (40% Stocks/60% Bonds) <input type="checkbox"/> Steward Balanced Strategy (60% Stocks/40% Bonds) <input type="checkbox"/> Steward Aggressive Growth Strategy (80% Stocks/20% Bonds) <input type="checkbox"/> Steward Diversified Equity Strategy (100% Stocks) | <ul style="list-style-type: none"> <input type="checkbox"/> Russell Life Points® Moderate Strategy (40% Stocks/60% Bonds) <input type="checkbox"/> Russell Life Points® Balanced Strategy (60% Stocks/40% Bonds) <input type="checkbox"/> Russell Life Points® Growth Strategy (80% Stocks/20% Bonds) <input type="checkbox"/> Russell Life Points® Diversified Equity Strategy (100% Stocks) |
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*Please keep a copy for your records
Fund prospectuses are available at www.AGFinancial.org/retirement or by calling 1.800.622.7526*

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Signature I wish to change Future Contributions Only **or** Existing Balance Only **or**
 ALL Contributions (both future contributions and my current existing balance)

X	/	/	
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Member's Signature

Date