



Change Form

IUE-CWA 401(k) Retirement Savings and Security Plan
 1460 Broad Street Bloomfield, NJ 07003
 (973) 893-0333 phone (973) 893-8225 fax
 www.iuepension.org

Participant Information - For all change types, please print clearly all the information requested in this section. If you wish to make changes only to your address, name, or marital status, it is not necessary to complete the other sections of this form.

Sign and date the reverse side, then mail or fax both sides to the Plan Office.

Check this box if this is a **change of address**
 Check this box if this is a **change of name**
 Check this box if this is a **change of marital status**

Name _____ Phone (____) _____

Address _____ Marital Status: _____ Never Married _____ Married
 _____ Widowed _____ Divorced

Company _____ Social Security Number _____ Birth Date _____

Email Address _____ Local Number _____

Contributions - Complete this section to change your contributions. Indicate below the **total amount** you would like to contribute to the Plan (choose one only, see your employer or contact the Plan Office for the correct choice). The Plan will notify your employer to follow your instructions.

_____% payroll OR \$ _____ dollars per week OR \$ _____ cents per hour

Please note: Minimum contributions of 1% of gross wages, \$4.00 per week, or 10 cents per hour are required. Legally you may contribute up to an amount determined annually by the IRS.

or _____ I would like to stop my contributions. I understand that by electing to voluntarily stop my contributions to the Plan that I **cannot** make contributions for **one full calendar year**.

Investment Election - You may make changes to both your future contributions and your existing balances. You may also make these changes on the internet at www.iuepension.org or through the toll-free voice response system at 877-778-2100.

The following is an example of how to make changes to your investment options using the reverse of this form.

Jane has been investing 50% of her contribution in the Guaranteed Income Fund and 50% in Dryden Stock Z Fund. She would like to change funds and diversify her investments more. She would now like to sell all her investment in Dryden Stock Z Fund and split that investment 50% to Growth Fund of America and 50% to Oppenheimer Main Street Fund, but keep her investment the same in the Guaranteed Income Fund.

Before Changes Existing Balances		Correct Change Existing Balances	Incorrect Change Existing Balances
<u>50%</u>	Prudential Guaranteed Income Fund	<u>50%</u>	_____
_____	PIMCO Total Return A Fund	_____	_____
_____	American Balanced Fund	_____	_____
<u>50%</u>	Prudential Stock Index Z Fund	_____	0%
_____	VanKampen Growth & Income R	_____	_____
_____	Growth Fund of America	<u>25%</u>	50%
_____	AIM International Growth A Fund	_____	_____
_____	Oppenheimer Main Street Small Cap A	<u>25%</u>	50%
_____	Victory Special Value A (Mid-Cap)	_____	_____
_____	Retirement Goal Income	_____	_____
_____	Retirement Goal 2010	_____	_____
_____	Retirement Goal 2020	_____	_____
_____	Retirement Goal 2030	_____	_____
_____	Retirement Goal 2040	_____	_____
_____	Retirement Goal 2050	_____	_____

YOU MUST SIGN THE OTHER SIDE TO COMPLETE THIS FORM

Investment Election - You may elect to change either Part A or Part B or both.

So that you may have flexibility in your investment strategy, the Investment Elections are a **two-step** process. Complete Part A for changes to Future Contributions only. Complete Part B to make changes to your Existing Balances only. To make changes to both, you must complete both Parts A and B.

A. The first step is your **Future Contribution Election**. This means that all your new contributions **from the process date forward** will be directed according to the elections you make on the change form. Be sure to indicate the percentage of your total contribution you wish to invest in each Fund.

If you would like to change only your Future Contributions, stop here, then sign and date this form and mail or fax both sides to the Plan Office. **To also change your Existing Balances, continue to the next step.**

Change Future Contributions to:

(All future contributions from the process date forward will be invested based on these percentages)

Stable Value: _____% Prudential Guaranteed Income Fund

Fixed Income: _____% PIMCO Total Return Fund A

Balanced: _____% American Balanced Fund A

Large Cap Equity: _____% Prudential Stock Index Fund Z
_____% VanKampen Growth & Income Fund R
_____% Growth Fund of America Fund R3

International Equity: _____% AIM International Growth Fund A

Small/Mid Cap Equity: _____% Oppenheimer Main St Small Cap Fund A
_____% Victory Special Value A (Mid-Cap)

Retirement Goal Funds: _____% Retirement Goal Income
_____% Retirement Goal 2010
_____% Retirement Goal 2020
_____% Retirement Goal 2030
_____% Retirement Goal 2040
_____% Retirement Goal 2050

100 %

Be sure your investment elections add up to 100%

B. The second step is your **Existing Balances**. This means that all the money **already invested** in your account will be reinvested according to the elections you make on the change form. In other words, if you wish to move the money you see on your quarterly statement or on your account balance statement on the website to different investment funds, you must complete this section. **Please be sure to indicate what percentage of your entire balance you wish to have invested in each fund.**

Transfer Existing Balances

(any existing balances will be changed to these percentages)

Stable Value: _____% Prudential Guaranteed Income Fund

Fixed Income: _____% PIMCO Total Return Fund A

Balanced: _____% American Balanced Fund A

Large Cap Equity: _____% Prudential Stock Index Fund Z
_____% VanKampen Growth & Income Fund R
_____% Growth Fund of America Fund R3

International Equity: _____% AIM International Growth Fund A

Small/Mid Cap Equity: _____% Oppenheimer Main St Small Cap Fund A
_____% Victory Special Value A (Mid-Cap)

Retirement Goal Funds: _____% Retirement Goal Income
_____% Retirement Goal 2010
_____% Retirement Goal 2020
_____% Retirement Goal 2030
_____% Retirement Goal 2040
_____% Retirement Goal 2050

100 %

Be sure your investment elections add up to 100%

Please use whole percentages when making selections (10%, not 9.5%). Your total must be 100%.

Authorization

I authorize the IUE-CWA Retirement Savings and Security Plan to carry out the change(s) indicated on both sides of this form, subject to the terms and provisions of the Plan. An authorized copy of this form will be returned to me acknowledging my elections.

Participant's Signature _____

Date _____/_____/_____