How to Match Your Portfolio to the
Truepoint Capital Recommended Allocations

- Go to **www.truepointplan.com** and click on **"Recommended Allocations"** in the menu bar across the top of the page.

- Open current recommendations, noted by date.

- Print this document or keep the document open in the new internet browser window.

- Choose the appropriate Investment Portfolio.

  Note: For help in determining which of the five Investment Portfolios is most appropriate, please utilize the "Investor Questionnaire" that is accessible at www.truepointplan.com.

- Return now to the original internet browser window (www.truepointplan.com) and select **"Client Login"** from the menu bar across the top of the page. Login to your account by entering your **User ID** and **Password** before clicking on the **"Participant"** button.

  Note: If you have not already established a User ID and Password, your default User ID is your Social Security Number (without dashes or hyphens) and your default Password is the last 4 digits of your Social Security Number. If you wish, you may change your User ID and Password after your initial login.

- Your Participant Summary page will open upon logging-in. Click on **"Investment Elections"** in the menu along the left side.

- The table now appearing lists your current allocation percentages and provides the opportunity to enter new percentages. Under the **"New %"** column, enter the percentages indicated on the Recommended Allocations page for the appropriate portfolio. Once the percentages entered equal 100%, click **"Submit"** at the bottom of the page.

- An Election Change verification screen will now appear. Upon confirming the appropriate allocations, click **"Continue."** You will now receive a confirmation number that can be used to reference this transaction in the future. At this point you have successfully updated your allocations for future contributions but you have not re-allocated your existing portfolio.

- Click **"Rebalance Portfolio"** in the menu along the left side.

- There is no data to be entered on this screen; you simply need to click **"Submit."** Another verification screen will appear, again click **"Continue"** to receive a confirmation number for this transaction. You have now successfully re-allocated your existing portfolio to match the allocation of all future contributions.

- All requested transactions will be completed within 3 business days.