

How to Match Your Portfolio to the Truepoint Inc. 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.