



## Allocation of Future Contributions and Fund Reallocation Form

**MEMBER ID:** \_\_\_\_\_

Annuity Plan

Retirement Savings Account (RSA)

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### PERSONAL INFORMATION

SSN: \_\_\_\_\_

Name of Member (last, first, middle initial): \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Cell Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_ Email: \_\_\_\_\_

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### INSTRUCTIONS

You may only submit one (1) allocation/reallocation form per month. You may make multiple allocation/reallocation changes on one form.

Send this form as soon as possible. The Pension Boards must receive this form no later than 1:00 p.m. (ET) on the last business day of the month to be allocated/reallocated effective the first of the following month. All forms received after 1:00 p.m. (ET) on the last business day of the month will be allocated/reallocated effective the first day of the second month following submission.

You may also reallocate your accumulation balances by logging into your account at [www.pbucc.org](http://www.pbucc.org).

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### ALLOCATION OF FUTURE CONTRIBUTIONS

Allocate your future contributions in 5% increments below.

I wish to change the allocation of my future contributions:

**Employer Contributions:**

I elect to allocate my future employer contributions as indicated below.

*(Please complete row 1 of allocation table)*

**Employee Pre-Tax (TSA) Contributions and Employee After-Tax Contributions:**

I elect to allocate my future TSA contributions and Employee After-Tax contributions as indicated below.

*(Please complete row 2 of allocation table)*

## REALLOCATION OF CURRENT BALANCES

Allocate your current balance in 1% increments below.

I wish to reallocate my current balances:

### Employer Contributions:

I wish to reallocate my entire current contributions according to the percentage(s) below.

I wish to reallocate the employer contributions in my \_\_\_\_\_ Fund as below. Please do not allocate the balance(s) of any other Fund(s). *(Please complete row 3 of allocation table)*

### Employee Pre-Tax (TSA) Contributions and Employee After-Tax Contributions:

I wish to reallocate my entire TSA and Employee After-Tax current balance according to the percentage(s) shown below.

I wish to reallocate my entire TSA and Employee After-Tax current balance in my \_\_\_\_\_ Fund as below. Please do not reallocate the balance(s) in any other Fund(s).  
*(Please complete row 4 of allocation table)*

## INVESTMENT ALLOCATIONS

Information about our funds are available online.

		Sustainable Balanced Fund	Bond Fund	Equity Fund	Stable Value Fund	Global Sustainability Index Fund	TAD Fund 2025	TAD Fund 2030	TAD Fund 2035	TAD Fund 2040	TAD Fund 2045	TAD Fund 2050	Fund percentage must total 100%
Allocation of Future Contributions (5% increments)													
1	Employer Contributions	%	%	%	%	%	%	%	%	%	%	%	Total: _____%
2	Employee TSA and After-Tax Contributions	%	%	%	%	%	%	%	%	%	%	%	Total: _____%
Reallocation of Current Balances (1% increments below)													
3	Employer Contributions	%	%	%	%	%	%	%	%	%	%	%	Total: _____%
4	Employee TSA and After-Tax Contributions	%	%	%	%	%	%	%	%	%	%	%	Total: _____%

**SIGNATURE**

By signing below, you agree for the Pension Boards to allocate future contributions and/or reallocate current balances as indicated in the above table.

Member Signature \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Please return this signed and completed form by email to: [info@pbucc.org](mailto:info@pbucc.org); by fax: 212.729.2701; or mail to: Pension Boards-UCC, 475 Riverside Drive, Suite 1020, New York, NY 10115.