

## Target Allocation Form

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### Part 1 – Account Information

Organization name \_\_\_\_\_ Account number \_\_\_\_\_

Account name \_\_\_\_\_

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### Part 2 – Target Allocation

Please complete the following information. Enter your allocation in 1% increments; the total must equal 100%. If the total **does not** equal 100%, the form is invalid and will be returned.

Fund Name	Allocation for Account
Fixed Income Fund – I Series (51C)	_____ %
Inflation Protection Fund – I Series (52C)	_____ %
International Equity Fund – I Series (53C)	_____ %
International Equity Index Fund – I Series (56C)	_____ %
Multiple Asset Fund – I Series (54C)	_____ %
Short Term Investment Fund – I Series (55C)	_____ %
Social Values Choice Bond Fund – I Series (77C)	_____ %
Social Values Choice Equity Fund – I Series (78C)	_____ %
U.S. Equity Fund – I Series (57C)	_____ %
U.S. Equity Index Fund – I Series (58C)	_____ %
U.S. Treasury Inflation Protection Fund – I Series (59C)	_____ %
<b>Total</b>	<b>_____ 100%</b>

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### Part 3 – Signature

Print name of signatory \_\_\_\_\_ Title \_\_\_\_\_

Signature on behalf of organization \_\_\_\_\_ Date \_\_\_\_\_

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- ▶ Please complete this form and send it by:
- E-mail (scanned copy) to **support@wespath.org**
  - Fax to **1-847-866-4894**
  - Mail to **Plan Sponsor Management Team**  
**Wespath Institutional Investments**  
**1901 Chestnut Avenue**  
**Glenview, IL 60025-1604**

Be sure to keep a copy for your records.