



# PERSI Choice 401(k) Plan

## FUND TRANSFER WORKSHEET

Please complete before calling or going online to transfer your funds.

Changing your investment options in the PERSI Choice 401(k) Plan is easy. Once you receive your Personal Identification Number (PIN), just call the PERSI Choice Plan Voice Response System or log on to the PERSI website. Before you call or log on, however, it is important to read the materials enclosed in the enrollment kit to help you make the choices that are right for you. Then complete Steps 1 through 4 of this worksheet.

Use this worksheet to decide how you will invest your contributions among the different options and refer to it as you enter your choices over the phone or website. **This is not an enrollment form.** To begin contributions, you must complete a *Choice 401(k) Plan Deferral Election* form which you can obtain from your Payroll Department or the PERSI website.

### Step 1

Have your Social Security number ready \_\_\_\_\_

### Step 2

Have your 6-digit Personal Identification Number (PIN) ready \_\_\_\_\_

### Step 3

Determine how you want your contributions allocated among the investment options in the Plan. All percentages must be in increments of 1% and your elections must total 100%. For more information on the funds, call toll-free **1-866-ID-PERSI** or log on to [www.persi.idaho.gov/choice.htm](http://www.persi.idaho.gov/choice.htm).

SEI Stable Asset Fund	Ticker Symbol:	N/A	%
Mellon Aggregate Bond Index Fund	Ticker Symbol:	N/A	%
Dodge and Cox Fixed Income Fund	Ticker Symbol:	DODIX	%
Calvert Socially Responsible Sudan-free Balanced Fund	Ticker Symbol:	CBAIX	%
PERSI Total Return Fund (default investment option*)	Ticker Symbol:	N/A	%
Mellon S&P 500 Stock Index Fund	Ticker Symbol:	N/A	%
Vanguard Growth & Income Fund	Ticker Symbol:	VGIAX	%
Mellon Wilshire 5000 Stock Index Fund	Ticker Symbol:	N/A	%
Mellon International Stock Index (EAFE) Fund	Ticker Symbol:	N/A	%
Brandes International Equity Fund	Ticker Symbol:	BIIEIX	%
Mellon Wilshire 4500 Completion Index Fund	Ticker Symbol:	N/A	%
T.Rowe Price Small Cap Stock Fund	Ticker Symbol:	OTCFX	%
<b>Total Percentage</b>			<b>100%</b>

\*Your Choice Plan contributions are automatically invested 100% in the PERSI Total Return Fund unless you direct otherwise by calling or going to the website. If your preference is to contribute 100% to the PERSI Total Return fund, no action is required.

### Step 4

Call toll-free **1-866-437-3774** or go to the website at [www.persi.idaho.gov/choice.htm](http://www.persi.idaho.gov/choice.htm) and select "My Choice Plan Account". Follow the directions to enter the information from Steps 1 through 3. Once all information is accepted, your elections will be confirmed. A confirmation will be mailed to your address on file within 3-5 business days.