

SALARY DEFERRAL / INVESTMENT DIRECTION ELECTIONS

PARTICIPANT INFORMATION

Employer/Plan Name: PERSEUS HOUSE, INC. RETIREMENT PLAN

Name: _____

Mailing Address: _____

(Street, City, State and Zip Code)

Social Security #: _____ Date of Birth: _____ Hire Date: _____

Email Address (if available): _____ Phone Number: _____



☐ I choose to **Go Green** and have electronic statements. I understand no hard copies will be mailed to me and electronic statements will be available on the website (including historical statements) and may be printed upon demand.

SALARY DEFERRAL ELECTION

Elective Deferrals (check one):

☐ I elect to have withheld and contribute a flat dollar amount per pay period.

Traditional Pre-tax	Roth
\$	\$

☐ I elect to have withheld and contribute a percentage of my salary per pay period.

Traditional Pre-tax	Roth
%	%

☐ I do not wish to participate and elect not to make salary deferral contributions to the Plan at this time.

☐ I hereby withdraw my authorization to continue payroll deductions under the plan. I understand this will be effective as soon as administratively possible following delivery of this notice to the Employer.

For first-time enrollments only: I understand that if I do not make an election regarding the investment of my account balance, my entire account balance will be invested in the Target Retirement date according to my year of birth (reference the Qualified Default Investment Alternative (QDIA) notice).

INVESTMENT OPTIONS

Check one option listed below. If no option is selected, then Investment Change (future contribution only) will be processed.

- ☐ New Enrollment
- ☐ Investment Change (future contributions only)
- ☐ Investment Change (existing balances only)
- ☐ Investment Change (both future contributions and existing balances)

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Your 401(k) Team
Northwest Bank and Definiti are independent non-affiliated companies.



Build Your Own Personalized Portfolio:

You may choose to build your own personalized retirement portfolio by electing among various mutual funds that have different investment strategies and risk and reward characteristics. Please research the fund options and make your elections by completing the "Enter Percentage" column below. To further research Fund options visit www.morningstar.com. Morningstar is a third-party agency that provides ratings and analysis of mutual funds. When completing your elections, please make sure your percentages below total 100%.

Morningstar Category	Fund Name / Ticker Symbol	Enter %
Retirement Income	American Century One Choice In Retirement / ARDTX	
Retirement 2025	American Century One Choice 2025 / ARWDX	
Retirement 2030	American Century One Choice 2030 / ARCUX	
Retirement 2035	American Century One Choice 2035 / ARLDX	
Retirement 2040	American Century One Choice 2040 / ARDUX	
Retirement 2045	American Century One Choice 2045 / ARDOX	
Retirement 2050	American Century One Choice 2050 / ARFEX	
Retirement 2055	American Century One Choice 2055 / AREUX	
Retirement 2060	American Century One Choice 2060 / ARGDX	
Retirement 2065+	American Century One Choice 2065 / ARHSX	
Money Market	Federated Hermes Prime Cash Obligations Wealth / PCOXX	
Short-Term Bond	Vanguard Short-Term Investment-Grade / VFSUX	
Broad Bond	Federated Total Return Bond / FTRBX	
Large Co Value	Diamond Hill Large Cap / DHLRX	
Large Co Blend	Vanguard 500 Index / VFIAX	
Large Co Blend	Vanguard Total Stock Market Index / VTSAX	
Large Co Growth	T Rowe Price Blue Chip Growth / TRBCX	
Mid Co Value	Victory Sycamore Established Value / VEVX	
Mid Co Growth	T. Rowe Price Mid Cap Growth / RPMGX	
Small Co Value	Undiscovered Managers Behavioral Value / UBVLX	
Small Co Growth	T Rowe Price QM US Small-Cap Gr Equity / PRDSX	
Foreign Value	DFA International Core Equity / DFIEX	
Foreign Large Growth	Harding Loevner International Equity / HLMIX	
Emerging Markets	JP Morgan Emerging Market Equity / JMIEX	
Total		100%

☐ *Please rebalance my account annually on each January 20th

*To modify the rebalancing frequency of your investments, please visit www.benefitwebaccess.com/login/.

All elections will be implemented as soon as administratively possible after receipt.

Participant's Signature _____

Date _____



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