403(b) Account Maintenance Request Form

To change future investment elections, see **Step 1: Update Future Investment Elections.**
To change the Auto Rebalance option, see **Step 2: Auto Rebalance.**
To change current balance, see **Step 3: Update Current Account Balance. You may select only one option.**

Option 1: Rebalance - Adjusts your balance to match your current investment allocation choices.
Option 2: Transfer - Allows you to transfer your existing balance from one investment into any other available investment choices.
Option 3: Realignment - Allows you to reallocate your existing balances from all investments into any other available investment choices.

Account Number

Disclaimers

Fund: A Fund Review will be conducted to ensure that the fund(s) you have elected into is/are available. If any fund(s) is/are not available, that percentage will be allocated into the Federated Automated Cash Management Trust (Ticker ACKXX) until a new fund has been selected. You will be contacted via email to alert you to any fund issues.

Allocation: Please note, full percentages are needed to act upon this trade request. No dollar amounts or fractional percentages are accepted.

Source: Any and all trade instructions on the proceeding pages will be applied to all sources within the account, outside of any frozen assets one might hold.

To move any frozen assets, please use the ***Frozen Assets Transfer Request Authorization Form.***

STEP 1 UPDATE FUTURE INVESTMENT ELECTIONS

(NOTE: For investments with a front-end sales charge that you wish to be purchased at NAV, you MUST check the LW box to waive the sales charge, as allowed by the fund family)

This feature only changes your investment elections for future contributions. It does not affect the allocation of existing balances already in your portfolio, however PLEASE NOTE that if you have elected the Auto Rebalance Feature and/or you are in a Model Portfolio and your investment advisor rebalances the model portfolio, your current balance WILL be changed to the most current investment elections on file at the time of that particular transaction. To not have this occur, please opt out of the auto rebalance feature and/or change your elections from a Model Portfolio to a Custom Investment election.

Ticker Symbol	Investment Name	LW	Allocation %

NOTE: If the Prudential Guaranteed Interest Account is selected, please ask your representative for the additional required forms.

Your total must equal 100% **TOTAL** 0

STEP 2 AUTO REBALANCE

Automatic Rebalancing: This feature, if elected, automatically rebalances the investments in your account to maintain the asset allocation percentages that you elect. The frequency of this feature is determined by plan/account provisions. Please login to your Aspire account to verify the frequency for your specific account.

Do you want to have your account automatically rebalanced? ☐ Yes ☐ No ***If nothing is selected, no update will be made.***

STEP 3 UPDATE CURRENT ACCOUNT BALANCE

☐ OPTION 1 REBALANCE

Adjusts your balance to reflect your existing investment allocation choices. If you have selected new investments on this form it will cause your entire account balance to rebalance into those elections. If you have not completed Step 1, it will match your existing investment allocations selected.

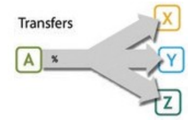
☐ Yes ☐ No ***If nothing is selected, no action will be taken on your current balance.***

Fax this form to 813.466.7523 or **mail** to: Aspire, 4010 Boy Scout Blvd., Suite 450, Tampa, FL 33607.
Questions? Call Client Services at 866.634.5873, M - F, 8am - 8pm EST.

OPTION 2 TRANSFER

(NOTE: For investments with a front-end sales charge that you wish to be purchased at NAV, you MUST check the LW box to waive the sales charge, as allowed by the fund family)

Allows you to transfer your existing balance from one investment into any other available investment choices. Your total must equal 100%. Whole %s Only. Only one transfer request per sheet. **This feature does not change your future contributions investment elections.**



CURRENT INVESTMENT

Ticker	Investment Name	%

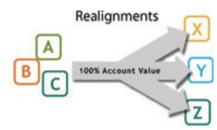
NEW INVESTMENTS

Ticker	Investment Name	LW	%

OPTION 3 REALIGNMENT

(NOTE: For investments with a front-end sales charge that you wish to be purchased at NAV, you MUST check the LW box to waive the sales charge, as allowed by the fund family)

Allows you to reallocate your existing balances from all investments into any other available investment choices. Your total must equal 100%. Whole %s Only. **This feature does not change your future contributions investment elections.**



NEW INVESTMENTS

Ticker	Investment Name	LW	%

STEP 4 INVESTMENT AUTHORIZATION & SIGNATURE

When you selected an investment option on this Account Maintenance Request Form, you acknowledge that you are placing a buy/sell order instructing Aspire to purchase/sell investment shares on your behalf. You acknowledge that you have received and read the prospectus for investments, made the investment decision on your own, and understand that you were and are able to make a different investment selection.

You also acknowledge that the securities products purchased or sold in a transaction with Aspire (i) are not insured by the FDIC; (ii) are not deposits or other obligations of Aspire and are not guaranteed by the custodian; and (iii) are subject to investment risks, including possible loss of the principal invested.

Print Full Account Holder Name *(required)*

Social Security Number *(required)*

Account Holder Signature

Date (month | day | year)

Agent Disclaimer: By submitting this trade request, you are certifying that you have been previously established as the Authorized Agent on this account, and have been granted Limited Trading Authority (LTA) by the account holder. If you are not the financial professional currently listed on this account, or do not have LTA, this trade request will not be acted upon unless the account holder also signs this request form.

Print Full Agent Name

Rep ID

Authorized Agent Signature

Date (month | day | year)

If you provide an email address (participant or agent), Aspire will contact you via that address with regards to this trade request. If you do not provide an email address, you may contact our client Services line at 866.634.5873.

Contact Email

Please fax the completed form to Aspire Financial Services at 813.466.7523. Forms received in good order will be processed within 5 business days. If the account structure is changing (i.e. switching from one share class to another) please allow up to an additional 10 business days.