

# I.U.O.E. Local 138, 138A, 138B & 138C Annuity Fund Self Directed Allocation Form

<b>Name:</b>	
<b>SSN:</b>	
<b>DOB:</b>	
<b>Address:</b>	
<b>Phone:</b>	
<b>Email:</b>	

**Contribution Allocation Information**

Initial   or    Lump Sum Contribution

I wish to allocate \$ \_\_\_\_\_ or \_\_\_\_\_ % of my account balance (in increments of 1%)

I wish to allocate \_\_\_\_\_ % of my future contributions (in increments of 1%)

**Investment Allocation**

Select from the investment options below by indicating the percentage of your total contributions you want to invest in each option. Your selections must add up to 100%.

***Note: If no election is made, all contributions will be invested in the Target Date Asset Allocation Investment Alternatives***

Investment	All Contributions	
	current	new
<u>SAGIC Core Bond</u>		
<u>Premier U.S. Government Money Market Fund</u>		
<u>Premier Shrt-Drtm Bnd Fd (Barings)</u>		
<u>MassMutual RetireSMART Moderate Fund</u>		
<u>MassMutual RetireSMART In Retirement Fund</u>		

<u>MassMutual RetireSMART 2020 Fund</u>		
<u>MassMutual RetireSMART 2025 Fund</u>		
<u>MassMutual RetireSMART 2030 Fund</u>		
<u>MassMutual RetireSMART 2035 Fund</u>		
<u>MassMutual RetireSMART 2040 Fund</u>		
<u>MassMutual RetireSMART 2045 Fund</u>		
<u>MassMutual RetireSMART 2050 Fund</u>		
<u>MassMutual RetireSMART 2055 Fund</u>		
<u>American Funds Washington Mutual Investors Fund</u>		
<u>Vanguard 500 Index Fund</u>		
<u>MassMutual Premier Disciplined Growth Fund</u>		
<u>Wells Fargo Special Mid Cap Value Fund</u>		
<u>Goldman Sachs Mid Cap Value Fund</u>		
<u>Northern Mid Cap Index Fund</u>		
<u>MassMutual Select Mid Cap Growth Fund</u>		
<u>Northern Small Cap Index Fund</u>		
<u>American Funds EuroPacific Growth Fund</u>		

**Participate Authorization**

I authorize Local 138 to make allocation as I have indicated

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Note:** You should consider an investments objectives, risks, charges and expenses carefully before investing. For this and other information, see a fact sheet or the prospectus, if applicable. To view and/or print a prospectus, if applicable or fact sheet pertaining to the investment, click on the name of the investment and then the prospectus, if applicable, or fact sheet. You also may contact the Mass Mutual Participant Call Center at 1-800-743-5274 Monday through Friday between 8 a.m. and 9 p.m. ET to request a prospectus, if applicable, or fact sheet. Please read carefully before investing.

## **Important Contact Information:**

### **Local 138**

P.O. Box 206  
Farmingdale, NY 11735  
631-694-2480 ext. 3  
[www.local138.com](http://www.local138.com)

### **David M. Barnett**

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### **MassMutual Financial Group**

1-800-743-5274  
[www.retiresmart.com](http://www.retiresmart.com)