

4 Investment instructions

For fund names, numbers, minimums and share class descriptions, see the Fund Information page.

Note: The minimum initial and subsequent investment is \$25 per fund for payroll deduction plans. All future contribution investments will be applied using the selections identified below. To make changes to your fund selections and/or percentage allocations in the future, please notify your employer. The percentage specified must equal the fund minimum of \$25 per fund.

	Fund name	Fund number	Percentage
	Target Date _____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
You must select ONE of the following share classes: <input checked="" type="checkbox"/> Class A <input type="checkbox"/> Class C*	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	_____	<input type="text"/> <input type="text"/> <input type="text"/>	_____ %
	Total contribution		<u> </u> %

*See the Fund Information page for any share class restrictions.

Check one box below.

- Deduct the \$10 setup fee from the new account.
 I have included an additional \$10 for the setup fee (currency will not be accepted).

Note: For fee payments, do not send currency or cash — send only checks made payable to “Capital Bank and Trust Company.”

****To choose a Target Date Retirement Fund, figure out the year you would like to retire and choose the option below that is closest to your target retirement date. For example, if you would like to retire in 2023, you would choose the closest option which is the 2025 Target Date Retirement Fund.**

- American Funds 2050 Target Date Retirement Fund
- American Funds 2045 Target Date Retirement Fund
- American Funds 2040 Target Date Retirement Fund
- American Funds 2035 Target Date Retirement Fund
- American Funds 2030 Target Date Retirement Fund
- American Funds 2025 Target Date Retirement Fund
- American Funds 2020 Target Date Retirement Fund
- American Funds 2015 Target Date Retirement Fund

