



Reform Pension Board Asset Allocation Election Instructions

Completing the asset allocation process with RPB InfoExpress is easy. Simply follow the step-by-step instructions on the following page to make your election through the website or by phone.

Before you contact RPB InfoExpress, you should review the Investment Choice informational materials carefully to learn about the investment options available to you and how the election process works. Be sure to have the following information ready when you log on or call RPB InfoExpress:

- Your new asset allocation election,
- User ID, and
- Password for the website or Personal Identification Number (PIN) for the phone.

If you've lost or forgotten your User ID, password, or PIN and wish to have them mailed to you, or if you require additional assistance logging on to RPB InfoExpress, please contact Alliance Benefit Group's (the RPB record keeper) call center at 800-495-4015, Monday through Friday, between 8 AM and 7 PM (Eastern Time) and press "3" to speak with a call center representative.

The RPB InfoExpress website and toll-free number are available 24 hours a day, seven days a week during the open election period. You may change your election as often as you wish during the open election period. The last election recorded by the RPB InfoExpress system will be the one used to allocate your RPB account balance(s) and future contributions as of the election period's effective date.

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Contacting RPB InfoExpress through the Website

- Go to www.rpb.org
- Select “RPB InfoExpress” from the options at the left of the screen
- From the “Login Screen,” key in your User ID and password, then click “Login” (Be sure to click “Login”; pressing the “Enter” key will not log you in)
- Click on “Investment Elections” from the menu choices listed at the right side of the screen
- From the drop-down box in the middle of the page, select either the “RPB Standard Allocation*” or choose “Personal Election” to enter your own asset allocation in the “New %” column
- If you select “Personal Election,” indicate your choices in the “New %” column. If you select “RPB Standard Allocation,” the standard allocation of 60% Equity Fund, 40% Bond Fund will be entered automatically
- When your new election is entered in the “New %” column, click “submit”
- Review your asset allocation choice and click “continue” to submit your request
- Look for “Your request has been processed” and write down your confirmation number before logging out of the system; you must see this message to confirm that your new election is in place
- Watch for your confirmation in the mail within 7 to 10 days. You may also access your electronic confirmation in the “Reports” section of RPB InfoExpress

Contacting RPB InfoExpress by Phone

- Call RPB InfoExpress at 877-RPB-0414 (877-772-0414)
- Press 1 for English, 2 for Spanish
- Key in your social security number and PIN to access the main menu
- From the main menu, press 1 to access your personal account information
- Press 2 to access your investment information
- Press 2 again to change your investment election information
- Follow the prompts to specify your asset allocation choices
- Press 1 to confirm your request
- Listen for “your request has been recorded” and write down your confirmation number before exiting the system; you must hear this message to confirm that your new election is in place
- Watch for your confirmation in the mail within 7 to 10 days

* You can have your plan assets allocated to the RPB Standard Allocation in one step by selecting the “RPB Standard Allocation” election choice from the drop-down box in the Investment Elections screen on the website. The “RPB Standard Allocation” is 60% equities/40% bonds. As always, the RPB suggests that you consult with a financial advisor before making your asset allocation election to best determine the allocation that is right for you.