



CITY OF MADISON

457 DEFERRED COMPENSATION

FUTURE CONTRIBUTIONS	<input type="checkbox"/> YES	<input type="checkbox"/> NO
REALLOCATION OF EXISTING BALANCES	<input type="checkbox"/> YES	<input type="checkbox"/> NO
ANNUAL DECEMBER AUTO REBALANCE OR <input type="checkbox"/> QUARTERLY <input type="checkbox"/> SEMI-ANNUAL <input type="checkbox"/> NONE		

Employee Name _____ Social Security # XXX-XX- _____

CHOOSE 100% IN ONE TARGET MATURITY FUND

Schwab Target Retirement 2010 Index	Target Date	SWYAX	Expected Retirement Date Between 2000 - 2015	<input type="checkbox"/> 100%
Schwab Target Retirement 2020 Index	Target Date	SWYLX	Expected Retirement Date Between 2016 - 2020	<input type="checkbox"/> 100%
Schwab Target Retirement 2025 Index	Target Date	SWYDX	Expected Retirement Date Between 2021 - 2025	<input type="checkbox"/> 100%
Schwab Target Retirement 2030 Index	Target Date	SWYEX	Expected Retirement Date Between 2026 - 2030	<input type="checkbox"/> 100%
Schwab Target Retirement 2035 Index	Target Date	SWYFX	Expected Retirement Date Between 2031 - 2035	<input type="checkbox"/> 100%
Schwab Target Retirement 2040 Index	Target Date	SWYGX	Expected Retirement Date Between 2036 - 2040	<input type="checkbox"/> 100%
Schwab Target Retirement 2045 Index	Target Date	SWYHX	Expected Retirement Date Between 2041 - 2045	<input type="checkbox"/> 100%
Schwab Target Retirement 2050 Index	Target Date	SWYMX	Expected Retirement Date Between 2046 - 2050	<input type="checkbox"/> 100%
Schwab Target Retirement 2055 Index	Target Date	SWYJX	Expected Retirement Date Between 2051 - 2055	<input type="checkbox"/> 100%
Schwab Target Retirement 2060 Index	Target Date	SWYNX	Expected Retirement Date Between 2056 - 2060	<input type="checkbox"/> 100%

OR

You may check one portfolio model or choose to custom blend using the individual funds.			CONSERVATIVE 80%/20%	MODERATE LY CONSERVATIVE 60%/40%	MODERATE 40%/60%	MODERATE LY AGGRESSIVE 25%/75%	AGGRESSIVE 10%/90%	CUSTOM
Funds	Investment Style		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franklin Growth R6	Large Growth	FIFRX	6%	9%	11%	12%	14%	%
Calvert Equity I	Large Growth	CEYIX	0%	0%	0%	0%	0%	%
Vanguard 500 Index Admiral	Large Blend	VFIAX	0%	0%	0%	0%	0%	%
American Fundamental Investors R6	Large Blend	RFNGX	0%	0%	0%	0%	0%	%
TIAA-CREF Social Choice Equity Inst	Large Blend	TISCX	0%	0%	0%	0%	0%	%
MFS Value R6	Large Value	MEIKX	7%	11%	14%	16%	17%	%
JP Morgan Mid Cap Equity I	Mid-Cap Growth	VSNGX	0%	2%	2%	3%	4%	%
Schwab US Mid Cap Index	Mid Cap Blend	SWMCX	0%	0%	0%	0%	0%	%
Parnassus Mid Cap Inst	Mid Cap Blend	PFPMX	0%	0%	0%	0%	0%	%
Ariel Inst	Mid-Cap Value	ARAIX	2%	2%	4%	5%	6%	%
Janus Henderson Venture N	Small Growth	JVTNX	0%	0%	2%	3%	4%	%
Schwab Small Cap Index	Small Blend	SWSSX	0%	0%	0%	0%	0%	%
Fidelity Advisor Small Cap Value I	Small Value	FCVIX	0%	2%	3%	4%	5%	%
EuroPacific Growth R6	Foreign Blend	REGRX	5%	10%	14%	19%	23%	%
Cohen & Steers Realty Shares Inst	Specialty Real Estate	CSRIX	0%	2%	4%	5%	6%	***%
PIMCO Commodity Real Return Str. Inst	Broad Commodities	PCRIX	0%	2%	4%	5%	6%	***%
Invesco Oppenheimer Develop Mkts R6	Divers. Emerging	ODVIX	0%	0%	2%	3%	5%	***%
American Balanced R6	Moderate Allocation	RLBGX	0%	0%	0%	0%	0%	%
Eaton Vance High Income Opps I	High Yield Bond	EIHIX	4%	3%	2%	0%	0%	%
Baird Aggregate Bond Inst	Inter. Term Bond	BAGIX	15%	10%	5%	5%	5%	%
Templeton Global Bond R6	Global Bond	FBNRX	5%	5%	5%	5%	5%	%
BlackRock Inflation Protected Bnd K Svc	TIPS	BPLBX	16%	12%	8%	5%	0%	%
MetLife Stable Value - Class 0	Stable Value	METABG3	40%	30%	20%	10%	0%	%
INDIVIDUAL FUNDS MUST TOTAL 100%			** No more than 6**%				100%	

Signed this _____ day of _____, 20_____, we certify that the above information is accurate and correct. If a model is elected with this form, it will be rebalanced annually in December. Model Investment Choices and automatic rebalance timing and frequency can be changed on the Participant Website. Existing balances will be realigned with the model selected.

(PARTICIPANT SIGNATURE)

(9-2019)

**Forward completed and signed form to: Lincoln Financial Advisors, 406 Science Drive, Suite 310, Madison, WI 53711
or fax to: (608) 287-3056 or e-mail to: Andrea.Thorsness@ifg.com Call with questions: (608) 268-5100.**