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

Name :	
SSN:	
DOB:	
Address:	
Phone:	
Email:	

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 (based on your Date of Birth)

All Investments	**All Contributions**	
	Current (%)	**New (%)**
Fixed Income/Stable Value Funds		
John Hancock Stable Value Fund		
Wells Fargo Ultra Short-Term Income Fund		
Invesco Core Plus Bond Fund		
Fidelity Advisor Investment Grade Bond Fund		

Multi-Index Lifetime Portfolio Funds (The "Default Fund")		
John Hancock Multi-Index 2015 Lifetime Portfolio		
John Hancock Multi-Index 2020 Lifetime Portfolio		
John Hancock Multi-Index 2025 Lifetime Portfolio		
John Hancock Multi-Index 2030 Lifetime Portfolio		
John Hancock Multi-Index 2035 Lifetime Portfolio		
John Hancock Multi-Index 2040 Lifetime Portfolio		
John Hancock Multi-Index 2045 Lifetime Portfolio		
John Hancock Multi-Index 2050 Lifetime Portfolio		
John Hancock Multi-Index 2055 Lifetime Portfolio		
Equity Funds		
Vanguard 500 Index Fund		
JPMorgan Large Cap Growth Fund		
Vanguard Windsor II Fund (Large Cap Value)		
Morgan Stanley Institutional Fund Trust Mid Cap Growth		
Northern Mid Cap Index Fund		
John Hancock Disciplined Value Mid Cap Fund		
Northern Small Cap Index Fund		
BlackRock International Fund		
BlackRock Emerging Markets Fund		
Balanced/Specialty Funds		
American Funds - American Balanced Fund		
Baron Real Estate Fund		
Total Portfolio (must be equal to 100%)		

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 John Hancock Participant Call Center at 833-388-6466 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.

Participate Authorization

I authorize Local 138 to make my allocation as I have indicated above.

Name:____

Signature:______________________________________ Date: ________________

Important Contact Information:

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