

**CORE FUND/MODEL INVESTMENT DIRECTION FORM**



**Participant Information**

Plan Name: \_\_\_\_\_  New Participant  
 Your Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Birth Date: \_\_\_\_\_ Hire Date: \_\_\_\_\_ Phone: \_\_\_\_\_

**Investment Directions**

You may change the investment directions for your current account balance or future contributions. Indicate your new investment directions below. Percentages must be in 1% increments.

<b>Current Account Balances</b>			<b>Future Contributions</b>		
I hereby elect to have all <b>EXISTING</b> account balances invested as follows:			I hereby elect to have all <b>FUTURE</b> contributions be invested as follows:		
<b>Core Investment Options:</b>			<b>Core Investment Options:</b>		
%	Funds	Fund ID	%	Funds	Fund ID
_____	UPAL Money Market Fund	UD	_____	UPAL Money Market Fund	UD
_____	UPAL Short-Term Income Fund	UE	_____	UPAL Short-Term Income Fund	UE
_____	UPAL Core Bond Fund	U3	_____	UPAL Core Bond Fund	U3
_____	UPAL Real Return Portfolio Fund	UH	_____	UPAL Real Return Portfolio Fund	UH
_____	UPAL U.S. Large Cap Value Equity Fund	U5	_____	UPAL U.S. Large Cap Value Equity Fund	U5
_____	UPAL S&P 500 Index Equity Fund	U6	_____	UPAL S&P 500 Index Equity Fund	U6
_____	UPAL U.S. Large Cap Growth Equity Fund	U4	_____	UPAL U.S. Large Cap Growth Equity Fund	U4
_____	UPAL U.S. Small-MidCap Equity Fund	U7	_____	UPAL U.S. Small-MidCap Equity Fund	U7
_____	UPAL International Equity Fund	U8	_____	UPAL International Equity Fund	U8
%	Models/Self-Directed Option	Fund ID	%	Models/Self-Directed Option	Fund ID
_____	UPAL Fixed Income Allocation	U9	_____	UPAL Fixed Income Allocation	U9
	(formerly UPAL Conservative Asset Allocation Fund)			(formerly UPAL Conservative Asset Allocation Fund)	
_____	UPAL Conservative Allocation	UA	_____	UPAL Conservative Allocation	UA
	(formerly UPAL Balanced Asset Allocation Fund)			(formerly UPAL Balanced Asset Allocation Fund)	
_____	UPAL Balanced Allocation	UB	_____	UPAL Balanced Allocation	UB
	(formerly UPAL Moderate Allocation)			(formerly UPAL Moderate Allocation)	
_____	UPAL Aggressive Allocation	UC	_____	UPAL Aggressive Allocation	UC
	(formerly UPAL Aggressive Growth Asset Allocation Fund)			(formerly UPAL Aggressive Growth Asset Allocation Fund)	
_____	Self Directed Option ("SDO")	SD	_____	Self Directed Option ("SDO")	SD
%	Map Funds	Fund ID	%	Map Funds	Fund ID
_____	MAP Conservative Income Fund	A3	_____	MAP Conservative Income Fund	A3
_____	Map Target 2010 Fund	B1	_____	Map Target 2010 Fund	B1
_____	Map Target 2020 Fund	B2	_____	Map Target 2020 Fund	B2
_____	Map Target 2030 Fund	B3	_____	Map Target 2030 Fund	B3
_____	Map Target 2040 Fund	B4	_____	Map Target 2040 Fund	B4
_____	Map Target 2050 Fund	B5	_____	Map Target 2050 Fund	B5
_____	Map Target 2060 Fund	B6	_____	Map Target 2060 Fund	B6
100%			100%		

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

Changes can be requested through Bank of Oklahoma by calling Voice Direct (1-800-686-9457), online at [www.startright.bokf.com](http://www.startright.bokf.com), or by faxing this Form to **918-619-8980**.