



**CORE FUND/MODEL INVESTMENT DIRECTION WORKSHEET**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Employer: \_\_\_\_\_ Signature: \_\_\_\_\_

**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. No decimals or fractions are allowed. Call Lea Ann Nunley at 918-747-5585 if you need assistance. **ONCE YOU HAVE COMPLETED THE FORM, FAX BACK TO LEA ANN NUNLEY AT 918-747-5596.**

**Please keep this sheet as verification of your requested changes.**

<b><u>Current Account Balances</u></b>		
I hereby elect to have all <b>EXISTING</b> account balances invested as follows:		
<b>Core Investment Options:</b>		
<b>%</b>	<b>Funds</b>	<b>Fund ID</b>
_____	UPAL Money Market Fund	UD
_____	UPAL Short-Term Income Fund	UE
_____	UPAL Core Bond Fund	U3
_____	UPAL Alternative Investment Fund (formerly Absolute Return)	UH
_____	UPAL U.S. Large Cap Value Equity Fund	U5
_____	UPAL S&P 500 Index Equity Fund	U6
_____	UPAL U.S. Large Cap Growth Equity Fund	U4
_____	UPAL U.S. Mid Cap Equity Fund	U7
_____	UPAL U.S. Small Cap Equity Fund	CU
_____	UPAL Global Public Real Estate Fund	UN
_____	UPAL International Equity Fund	U8
<b>%</b>	<b>Models/Self-Directed Option</b>	<b>Fund ID</b>
_____	UPAL Fixed Income Allocation	U9
_____	UPAL Conservative Allocation	UA
_____	UPAL Balanced Allocation	UB
_____	UPAL Aggressive Allocation	UC
_____	Self Directed Option ("SDO")	SD
<b>%</b>	<b>MAP Funds</b>	<b>Fund ID</b>
_____	BOK Financial Retirement Conservative	BOKCOX
_____	BOK Financial Retirement Income	BOKIOX
_____	BOK Financial Retirement 2020	BOKTOX
_____	BOK Financial Retirement 2030	BOKHOX
_____	BOK Financial Retirement 2040	BOKROX
_____	BOK Financial Retirement 2050	BOKFOX
_____	BOK Financial Retirement 2060	BOKSOX
_____	BOK Financial Retirement 2070	BOKVOX
100%		

<b><u>Future Contributions</u></b>		
I hereby elect to have all <b>FUTURE</b> contributions be invested as follows:		
<b>Core Investment Options:</b>		
<b>%</b>	<b>Funds</b>	<b>Fund ID</b>
_____	UPAL Money Market Fund	UD
_____	UPAL Short-Term Income Fund	UE
_____	UPAL Core Bond Fund	U3
_____	UPAL Alternative Investment Fund (formerly Absolute Return)	UH
_____	UPAL U.S. Large Cap Value Equity Fund	U5
_____	UPAL S&P 500 Index Equity Fund	U6
_____	UPAL U.S. Large Cap Growth Equity Fund	U4
_____	UPAL U.S. Mid Cap Equity Fund	U7
_____	UPAL U.S. Small Cap Equity Fund	CU
_____	UPAL Global Public Real Estate Fund	UN
_____	UPAL International Equity Fund	U8
<b>%</b>	<b>Models/Self-Directed Option</b>	<b>Fund ID</b>
_____	UPAL Fixed Income Allocation	U9
_____	UPAL Conservative Allocation	UA
_____	UPAL Balanced Allocation	UB
_____	UPAL Aggressive Allocation	UC
_____	Self Directed Option ("SDO")	SD
<b>%</b>	<b>MAP Funds</b>	<b>Fund ID</b>
_____	BOK Financial Retirement Conservative	BOKCOX
_____	BOK Financial Retirement Income	BOKIOX
_____	BOK Financial Retirement 2020	BOKTOX
_____	BOK Financial Retirement 2030	BOKHOX
_____	BOK Financial Retirement 2040	BOKROX
_____	BOK Financial Retirement 2050	BOKFOX
_____	BOK Financial Retirement 2060	BOKSOX
_____	BOK Financial Retirement 2070	BOKVOX
100%		