

## Your Investment Options

# 1. Employer Information

Indicate how you would like your contributions invested. The LifePath funds are designed to provide a simple, one-fund solution targeted towards the five-year periods when you might anticipate retiring. A suggested range of birth years is shown in the table below. If you prefer to build your own asset allocation mix, you may choose from both the LifePath and the core funds menu below. You can change your investment election at any time after enrollment.

Provide your employer information.

Remember: The name of your employer is your employing School District or County Office of Education. For example, you might work at Morello Park Elementary, but Martinez Unified School District is your employer.

Employer (your School District or Organization)

Date of Hire (enter your date of hire for your current employer)

Questions? Call the CTA Enrollment Center at 916-235-9800.

LifePath fund menu (fund name)	Suggested range of birth years for LifePath funds	Ticker	Asset-based fees*	Election % (1% Increments)
BlackRock LifePath Index Retirement	Born before 1955	LIRKX	0.11%	_____
BlackRock LifePath Index 2020	Born Jan. 1, 1955 - Dec. 31, 1959	LIMKX	0.11%	_____
BlackRock LifePath Index 2025	Born Jan. 1, 1960 - Dec. 31, 1964	LIBKX	0.11%	_____
BlackRock LifePath Index 2030	Born Jan. 1, 1965 - Dec. 31, 1969	LINKX	0.11%	_____
BlackRock LifePath Index 2035	Born Jan. 1, 1970 - Dec. 31, 1974	LIJKX	0.11%	_____
BlackRock LifePath Index 2040	Born Jan. 1, 1975 - Dec. 31, 1979	LIKKX	0.11%	_____
BlackRock LifePath Index 2045	Born Jan. 1, 1980 - Dec. 31, 1984	LIHKX	0.11%	_____
BlackRock LifePath Index 2050	Born Jan. 1, 1985 - Dec. 31, 1989	LIPKX	0.11%	_____
BlackRock LifePath Index 2055	Born Jan. 1, 1990 - Dec. 31, 1994	LIVKX	0.10%	_____
BlackRock LifePath Index 2060	Born after Dec. 31, 1989	LIZKX	0.11%	_____
Core Fund Menu (fund name)	Asset Class	Ticker	Asset-based fees*	Election % (1% Increments)
Vanguard Federal Money Market Fund	Money Market	VMFXX	0.11%	_____
Vanguard Inflation-Protected Securities Fund	Inflation Protection	VAIPX	0.10%	_____
Vanguard Total Bond Market Index Fund	Bond	VBTLX	0.05%	_____
PIMCO Diversified Income Fund	Bond	PDIIKX	0.77%	_____
Vanguard Extended Market Index Fund	Small-Mid U.S Equity	VEXAX	0.08%	_____
Vanguard 500 Index Fund	Large U.S. Equity	VFIAX	0.04%	_____
Vanguard Total International Stock Index Fund	International Equity	VTIAX	0.11%	_____
TOTAL (must equal 100%)				100%

\*Reported by each fund manager as of September 30, 2018.  
Additional administrative fees apply and are clearly disclosed to you in your CTA Retirement Plan handbook or by visiting [CTARetirementPlan.org](http://CTARetirementPlan.org)

## 2. Your Information

<input type="text"/>	<input type="text"/>	<input type="text"/>
Mr. Mrs. Ms.	First Name	Middle Initial
<input type="text"/>		
Last Name		
<input type="text"/>		
Permanent Residential Street Address		
<input type="text"/>	<input type="text"/>	<input type="text"/>
City	State	Zip
<input type="text"/>	<input type="text"/>	
Social Security Number	Birth Date (mm/dd/yyyy)	
<input type="text"/>		
Personal Email Address		
<input type="text"/>	<input type="text"/>	
Home Phone	Mobile Phone	

## 3. Please Sign Here

I acknowledge that my enrollment in the CTA Retirement Savings Plan (“RSP”) is subject to the terms and conditions set forth in the CTA Voluntary Retirement Plans for Educators, LLC, CTA Retirement Savings Plan 403(b)(7) Custodial Account Agreement, as well as this Enrollment Agreement. I am able to review the Custodial Account Agreement online at [CTARetirementPlan.org](http://CTARetirementPlan.org), and I am fully responsible for all of its terms. I acknowledge that those terms include limitation of liability, mandatory arbitration of certain disputes, and class action waiver.

You will receive investment and account related information including notices at the email you provided on this form. If you prefer to receive paper forms at no cost, you can opt-out of electronic delivery when you set up your account on-line at a later date.

<input type="text"/>	<input type="text"/>
Signature	Date

**You're almost done.  
Just two more things to do:**

1. **Send or fax this form to:**  
**CTA Enrollment Center  
c/o Prudent Investor Advisors  
791 Eighth Street, Suite S  
Arcata, CA 95521  
Fax number: 707-822-5657**
2. **Complete the salary reduction form that comes from your district's retirement plan administrator.**

**Need help with this form? Call our enrollment support team at 916-235-9800 from 5 am to 5 pm, M-F.**