Flexible Plan Investments, Ltd.
Your partner in active wealth management

flexibleplan.com

Plan Strategy Change Request

It is acknowledged that the elections made below replace and supersede any and all previous elections in respect of selection of strategy. The choices evidenced below apply to each Electing Plan Participant and each Default Managed Participant.

Check only one strategy election; CHECK ONLY ONE PERCENTAGE (absence of designation of percentage results in approximate 50% allocation to Affiliated Mutual Funds.)

☒ **Market Leaders** (check one strategy and one percentage, if available)
Strategy Choice:

☐ **"Strategic"**
Percentage Choice:
- ☐ 0% Affiliated Mutual Funds, or
- ☐ 25% Affiliated Mutual Funds, or
- ☐ 50% Affiliated Mutual Funds, or
- ☐ 75% Affiliated Mutual Funds, or
- ☐ 100% Affiliated Mutual Funds.

☒ **"Tactical"**
Percentage Choice:
- ☐ 0% Affiliated Mutual Funds, or
- ☐ 25% Affiliated Mutual Funds, or
- ☐ 50% Affiliated Mutual Funds, or
- ☐ 75% Affiliated Mutual Funds, or
- ☒ 100% Affiliated Mutual Funds.

☐ **"Dynamic"**

☐ **Lifetime Evolution**
- ☐ 0% Affiliated Mutual Funds, or
- ☐ 25% Affiliated Mutual Funds, or
- ☐ 50% Affiliated Mutual Funds, or
- ☐ 75% Affiliated Mutual Funds, or
- ☐ 100% Affiliated Mutual Funds.

☐ **Dynamic Fund Profiles** (100% Affiliated Funds)

CAUTION: To interface with Flexible Plan's system and to accommodate the non-recurring activity generated by Strategy election or changes, Flexible Plan designates a once per week schedule for implementation. Accordingly, changes in strategy and/or percentage are effected by Flexible Plan only once per week. Strategy changes may take several weeks to process and/or complete in order to reduce the impact of platform trading rules and short-term redemption fees. Flexible Plan uses its best efforts to match its strategies to appropriate investment vehicles that do not impose redemption fees or trading restrictions during the holding period applicable to the strategy chosen. However, when a Client enters or exits a strategy, this action may cause a redemption fee to be generated, even though management in its normal course would not have done so.

Plan Sponsor represents and warrants that it retains the authority to bind the Plan to the elections above.

Plan: Hidalgo County 457 Plan

Plan sponsor: Hidalgo County

By: _____ Date: _____

Title: _____

Plan sponsor contact: _____
Print Name

Address: _____

Telephone: _____ Email Address: _____

#669-0314