



900 S Capital of TX Hwy, Ste. 350  
 Austin, TX 78746  
[FinPath403b@tcgservices.com](mailto:FinPath403b@tcgservices.com)  
 P: 800.943.9179 F: 888.989.9147

## FinPath 403(b) Enrollment Form

PERSONAL INFORMATION			
Full Name		Social Security #:	
Employer		Date of Birth	
Street Address		Contact Phone	
Apt/Bldg #		Contact Email	
City, State, Zip		<b>Advisor Name</b> <i>(if applicable)</i>	

INVESTMENT ALLOCATION OF CONTRIBUTIONS	
<p>If you do not designate fund elections or elections do not total 100%, your investment will default 100% to a target date based on your date of birth.</p>	
<p><input type="checkbox"/> <b>ELECTION 1- TARGET DATE FUND</b></p> <p style="text-align: center;"><i>Check the box that best defines your expected retirement year.</i></p> <p style="text-align: center;"> <input type="checkbox"/> 2015             <input type="checkbox"/> 2020             <input type="checkbox"/> 2025             <input type="checkbox"/> 2030             <input type="checkbox"/> 2035             <input type="checkbox"/> 2040             <input type="checkbox"/> 2045             <input type="checkbox"/> 2050             <input type="checkbox"/> 2055             <input type="checkbox"/> 2060         </p>	
<p><input type="checkbox"/> <b>ELECTION 2- RISK BASED PORTFOLIO</b></p> <p style="text-align: center;"><i>Check the appropriate box.</i></p> <p style="text-align: center;"> <input type="checkbox"/> Conservative             <input type="checkbox"/> Balanced             <input type="checkbox"/> Growth         </p>	
<p><input type="checkbox"/> <b>ELECTION 3- BUILD YOUR OWN PORTFOLIO</b></p> <p style="text-align: center;"><i>Allocations must equal 100%. If your selection is invalid or unclear, your contributions will be automatically invested in a target date fund.</i></p>	
BlackRock Total Return Instl _____ <b>.00%</b> DFA Emerging Markets Core Equity _____ <b>.00%</b> DEF Global Real Estate Securities _____ <b>.00%</b> DFA Inflation-Protected Securities I _____ <b>.00%</b> DFA International Core Equity I _____ <b>.00%</b> DFA International Small Company I _____ <b>.00%</b> DFA Large Cap International I _____ <b>.00%</b> DFA One-Year Fixed-Income I _____ <b>.00%</b> DFA US Core Equity I _____ <b>.00%</b> DFA US Large Cap Value I _____ <b>.00%</b>	DFA US Small Cap I _____ <b>.00%</b> DFA US Small Cap Value I _____ <b>.00%</b> Fidelity Government MMkt _____ <b>.00%</b> Fidelity Money Market _____ <b>.00%</b> PIMCO Short-Term A _____ <b>.00%</b> Templeton Global Bond Adv _____ <b>.00%</b> Vanguard 500 Index Admiral _____ <b>.00%</b> Vanguard Mid-Cap Value Index _____ <b>.00%</b> Vanguard US Growth Admiral _____ <b>.00%</b>
<p><b>Total Percent of Investment Allocation Must Equal    100%</b></p>	



900 S Capital of TX Hwy, Ste. 350  
Austin, TX 78746  
[FinPath403b@tcgservices.com](mailto:FinPath403b@tcgservices.com)  
P: 800.943.9179 F: 888.989.9147

## FinPath 403(b) Enrollment Form

### PARTICIPANT AUTHORIZATION

By completing this form, you are directing FinPath 403b to allocate funds to investment options offered by the FinPath 403b program. All of your rights under these funding vehicles are subject to the terms and conditions found at [www.finpath403b.com/disclosures](http://www.finpath403b.com/disclosures), your school district's 403(b) plan, and the distribution restrictions under the Internal Revenue Code.

Participant's Signature: \_\_\_\_\_ Date: \_\_/\_\_/\_\_\_\_