



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		Advisor Name <i>(if applicable)</i>	

### INVESTMENT ALLOCATION OF CONTRIBUTIONS

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.

**ELECTION 1- TARGET DATE FUND**

*Check the box that best defines your expected retirement year.*

2015    2020    2025    2030    2035    2040    2045    2050    2055    2060

**ELECTION 2 - BUILD YOUR OWN PORTFOLIO**

*Allocations must equal 100%. If your selection is invalid or unclear, your contributions will be automatically invested in a target date fund.*

American Funds American Balanced R6	_____	.00%	DFA US Small Value	_____	.00%
American Funds American Mutual R6	_____	.00%	Fidelity Advisor Asset Manager 50% Z	_____	.00%
American Funds Capital Income Bldr R6	_____	.00%	Fidelity Advisor Floating Rate Hi Inc Z	_____	.00%
American Funds Capital World Gr&Inc R6	_____	.00%	Fidelity Advisor Growth Opps Z	_____	.00%
American Funds EuroPacific Growth R-6	_____	.00%	Fidelity Advisor International Discv Z	_____	.00%
American Funds Fundamental Invs R6	_____	.00%	Fidelity Advisor Investment Gr Bd Z	_____	.00%
American Funds Growth Fund of America R6	_____	.00%	Fidelity Advisor New Insights Z	_____	.00%
American Funds Income Fund of Amer R6	_____	.00%	Fidelity Advisor New Markets Income Z	_____	.00%
American Funds Invmt Co of Amer R6	_____	.00%	Fidelity Advisor Stock Sel All Cp Z	_____	.00%
American Funds New Perspective R6	_____	.00%	Fidelity Advisor Strategic Income Z	_____	.00%
American Funds Washing Mutual R6	_____	.00%	Fidelity Advisor Total Bond Z	_____	.00%
DFA Emerging Markets Core Equity I	_____	.00%	Vanguard 500 Index Admiral	_____	.00%
DFA Emerging Markets Value	_____	.00%	Vanguard Equity-Income Fund Admiral	_____	.00%
DFA Five-Year Global Fixed Income	_____	.00%	Vanguard Federal Money Market Fund	_____	.00%
DFA International Core Equity	_____	.00%	Vanguard Interm-Term Tx-Ex Adm	_____	.00%
DFA International Small Company I	_____	.00%	Vanguard Mid-Cap Index Fund Admiral	_____	.00%
DFA Intl Small Cap Value	_____	.00%	Vanguard Small-Cap Index Admiral Share	_____	.00%
DFA US Core Equity 2 I	_____	.00%	Vanguard Total Bond MKT Index Admiral	_____	.00%
DFA US Large Value	_____	.00%	Vanguard Total INTL Stock Index Admiral	_____	.00%
DFA US Small Company	_____	.00%	Vanguard Total Intl Bond Index Admiral	_____	.00%

**Total Percent of Investment Allocation Must Equal 100%**



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### PARTICIPANT AUTHORIZATION

By completing this form, you are directing FinPath 403b to allocate funds to investment options offered by the FinPath 403b program and agreeing to the associated fees. All of your rights under these funding vehicles are subject to the terms, conditions, and fees 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:** \_\_/\_\_/\_\_