

Enrollment Form
Stoll Stoll Berne Lokting & Shlachter P.C. Profit Sharing Plan

Name: _____ Effective date: _____

Date of Hire: _____ Eligible to participate date: _____

You may revoke these elections at any time and may make changes quarterly. The elections below will remain in effect until such time as you change them.

Traditional Salary Deferrals (pre-tax contributions):

I elect to defer from each pay check _____% or \$_____.

I elect not to make any contributions at this time.

Roth Salary Deferrals (after-tax contributions):

I elect to defer from each pay check _____% or \$_____.

I elect not to make any contributions at this time.

Please note the combined annual limit in 2019 for the above deferrals is \$19,000 for those aged under 50 years, and \$25,000 for those aged 50 and above.

Fund Choices:

Please choose one or more of the following funds. Please complete the percentage amount you would like to invest for each fund or account chosen. The total must equal 100%.

_____ % **Vanguard Treasury Money Market Investor (VUSXX) – Money Market-Taxable**

_____ % **Vanguard Short-Term Investment Grade Adm (VFSUX) – Short-Term Bond**

_____ % **Dodge & Cox Income (DODIX) – Intermediate-Term Bond**

_____ % **Vanguard Total Bond Market Index Adm (VBTIX) – Intermediate-Term Bond**

_____ % **Osterweis Strategic Income (OSTIX) – High Yield Bond**

_____ % **JPMorgan Strategic Income Opports R5 (JSORX) - Nontraditional Bond**

_____ % **Dodge & Cox Stock (DODGX) – Large Value**

_____ % **Vanguard Value Index Adm (VVIAX) – Large Value**

_____ % **DFA US Core Equity 1 I (DFEOX) – Large Blend**

_____ % **DFA US Sustainability Core (DFSIX) – Large Blend**

_____ % **Vanguard Total Stock Market Index (VTSAX)**

_____ % **Vanguard Growth Index Admiral (VIGAX) – Large Growth**

_____ % **Polen Growth Institutional (POLIX) – Large Growth**

_____ % **Vanguard Mid Cap Index Admiral (VIMAX) – Mid-Cap Blend**

_____ % **DFA US Small Cap I (DFSTX) – Small Blend**

_____ % **Vanguard Real Estate Index Admiral (VGSLX) – Real Estate**

_____ % **Vanguard Total World Stock Index (VTWSX)**

_____ % **DFA International Core Equity I (DFIEX) – Foreign Large Blend**

_____ % **JOHCM International Select I (JOHIX) – Foreign Large Growth**

_____ % **IVA International I (IVIQX) – Foreign Small/Mid Blend**

_____ % **Seafarer Overseas Gr and Income Instl (SIGIX) – Diversified Emerging Markets**

_____ % **Vanguard Emerging Markets Stock Idx Adm (VEMAX) -Diversified Emerging Mkts**

_____ % **Vanguard Balanced Index Inv (VBIAX) – 50%-70% Equity**

_____ % **Vanguard Target Retirement Income Inv (VTINX) – Target Date Retirement**

_____ % **Vanguard LifeStrategy Moderate Growth (VSMGX)**

_____ % **Vanguard LifeStrategy Growth (VASGX)**

_____ % **Vanguard Target Retirement 2020 (VTWNX) – Target Date 2020**

_____ % **Vanguard Target Retirement 2025 (VTTVX) – Target Date 2025**

- _____ % **Vanguard Target Retirement 2030 (VTHR) – Target Date 2030**
- _____ % **Vanguard Target Retirement 2035 (VTTH) – Target Date 2035**
- _____ % **Vanguard Target Retirement 2040 (VFOR) – Target Date 2040**
- _____ % **Vanguard Target Retirement 2045 (VTIV) – Target Date 2045**
- _____ % **Vanguard Target Retirement 2050 (VFIF) – Target Date 2050**
- _____ % **Vanguard Target Retirement 2055 (VFFV) – Target Date 2055**
- _____ % **Vanguard Target Retirement 2060 (VTTS) – Target Date 2060**

I hereby certify that I have received a Prospectus and/or other information about the funds I have chosen, and I have read and understood the Profit Sharing Plan policies and procedures. By signing this form I further certify that all personal information, including my Social Security Number, is correct.

Date: _____

Name: _____

Signature: _____