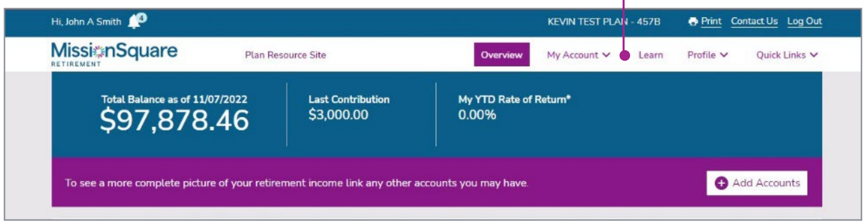
Your Participant Website

Change Investments and Allocations

Contents

The ability to view and edit your investment types and allocations is just one step away using the navigation panel at the top of the page. Your Investments can be accessed via two paths.

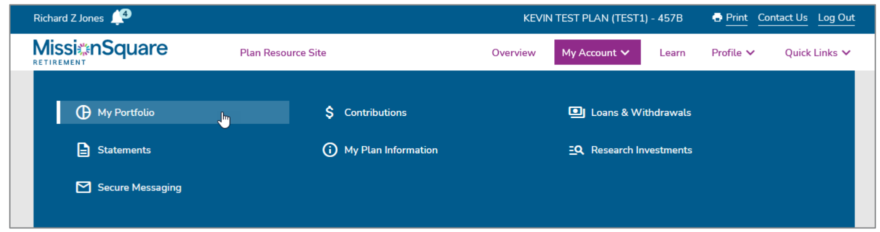
Navigation Panel



Steps to use with Single MissionSquare Account

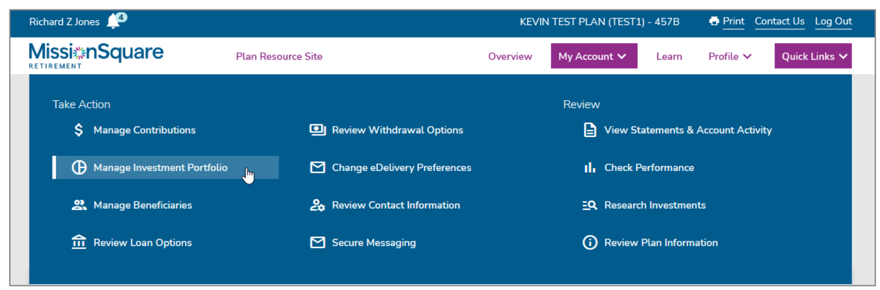
Path 1: My Account > My Portfolio Link

Using the top navigation panel, click on **My Account**, then in the left side column, click on **My Portfolio**.



Path 2: Quick Links > Manage Investment Portfolio

Using the top navigation panel, click on **Quick Links**, then in the left side column, click on **Manage Investment Portfolio**.



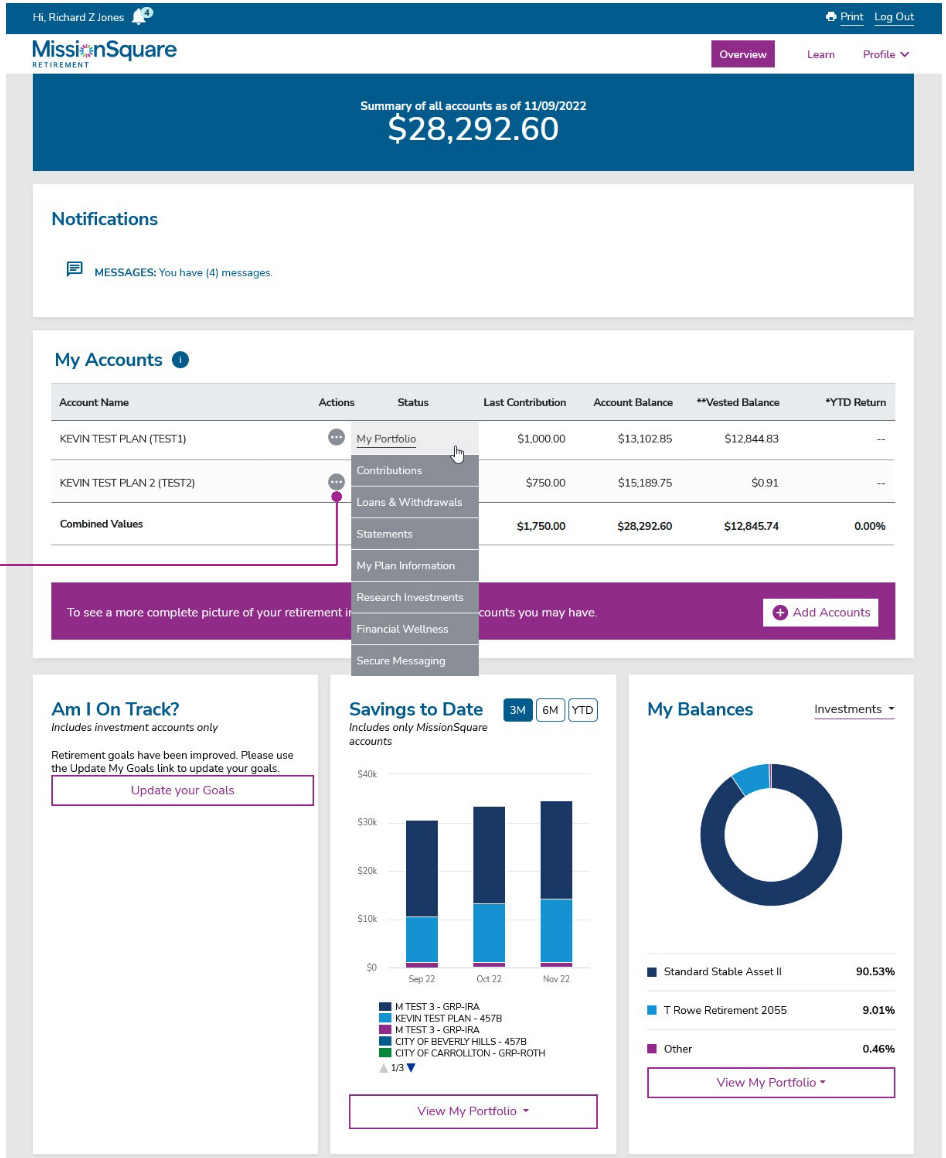
Steps to use with Multiple MissionSquare Accounts

If you have more than one MissionSquare account, your accounts will be displayed on the overview page in the **My Accounts** tile.

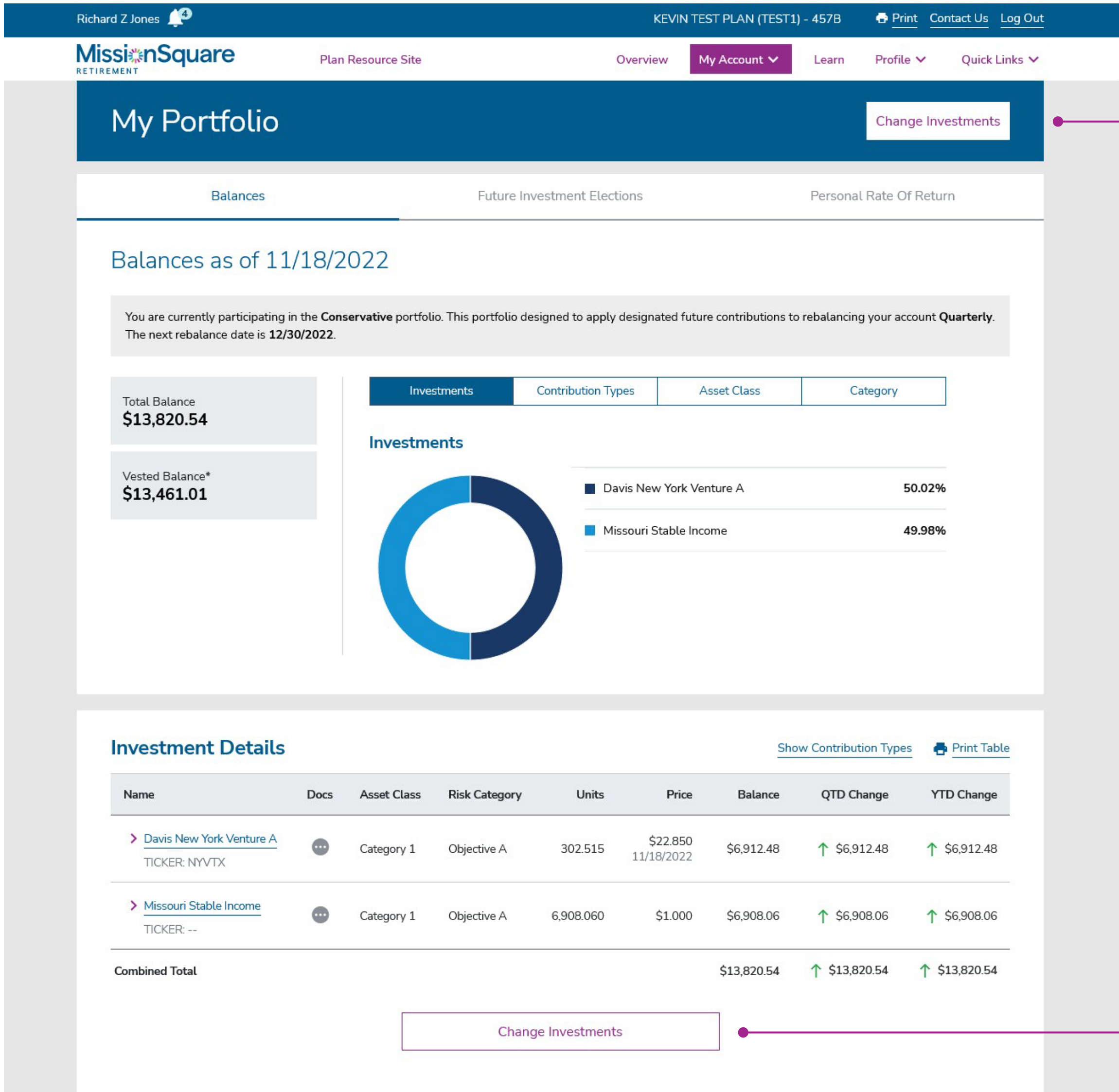
Since your investments and their allocations are unique to each account, you will need to select an account before making any investment changes. Simply click on the Actions icon next to the account name. This will display a pull-down menu.

Select **My Portfolio** from the pull-down menu. This Action will load the **My Portfolio** screen shown on the next page.

Actions icon



Change investments and allocations – My Portfolio Page



All paths outlined on pages 2 and 3 will load the My Portfolio screen shown to the left.

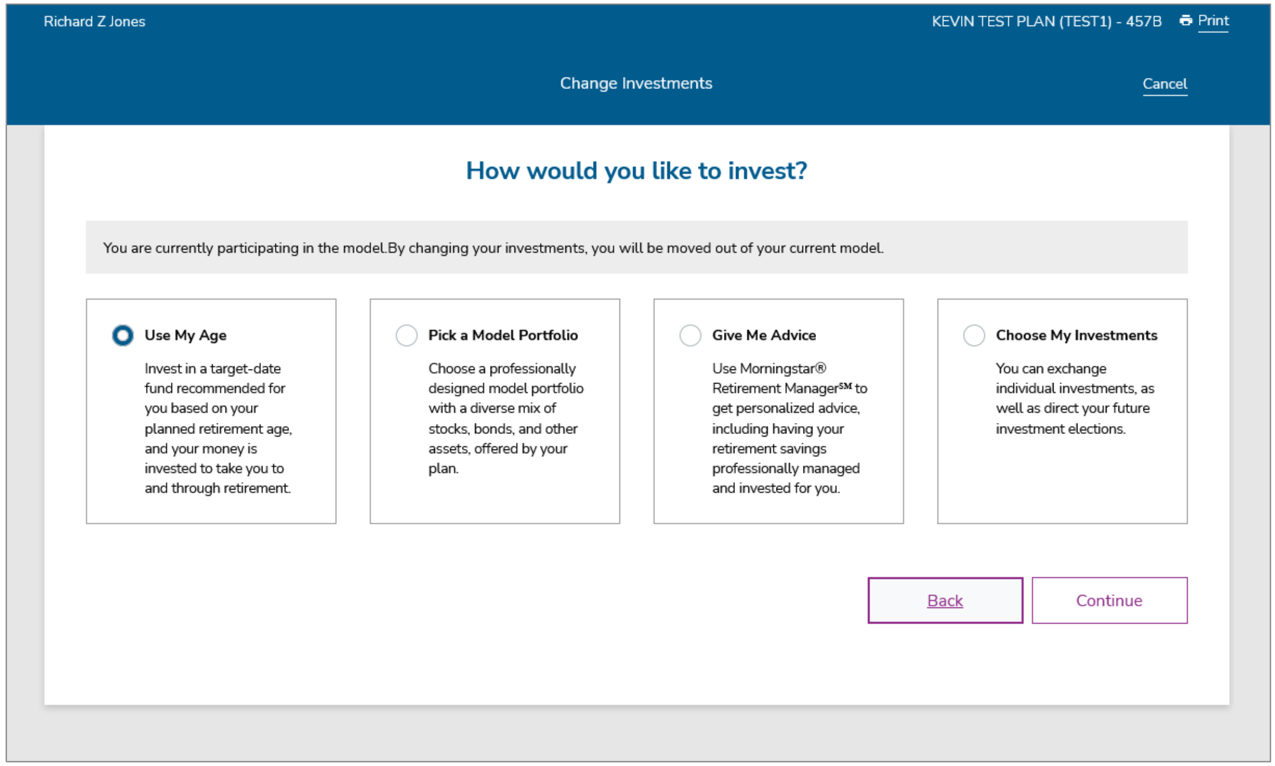
You'll find two **Change Investments** buttons on the My Portfolio screen. The first is at the top of the screen in the My Portfolio banner. The second is found at the bottom of the Investment Details tile.

Click one of these buttons to begin the change process.

Change Investments buttons

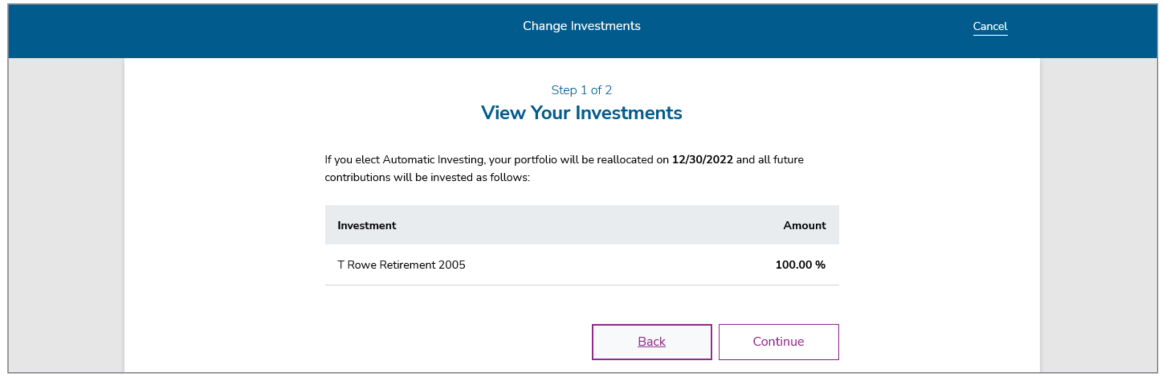
Change investments and allocations – Use My Age

The first process screen will present options on how you can invest. The first option, **Use My Age** will invest your contributions in a target date fund which is based on your planned retirement age.

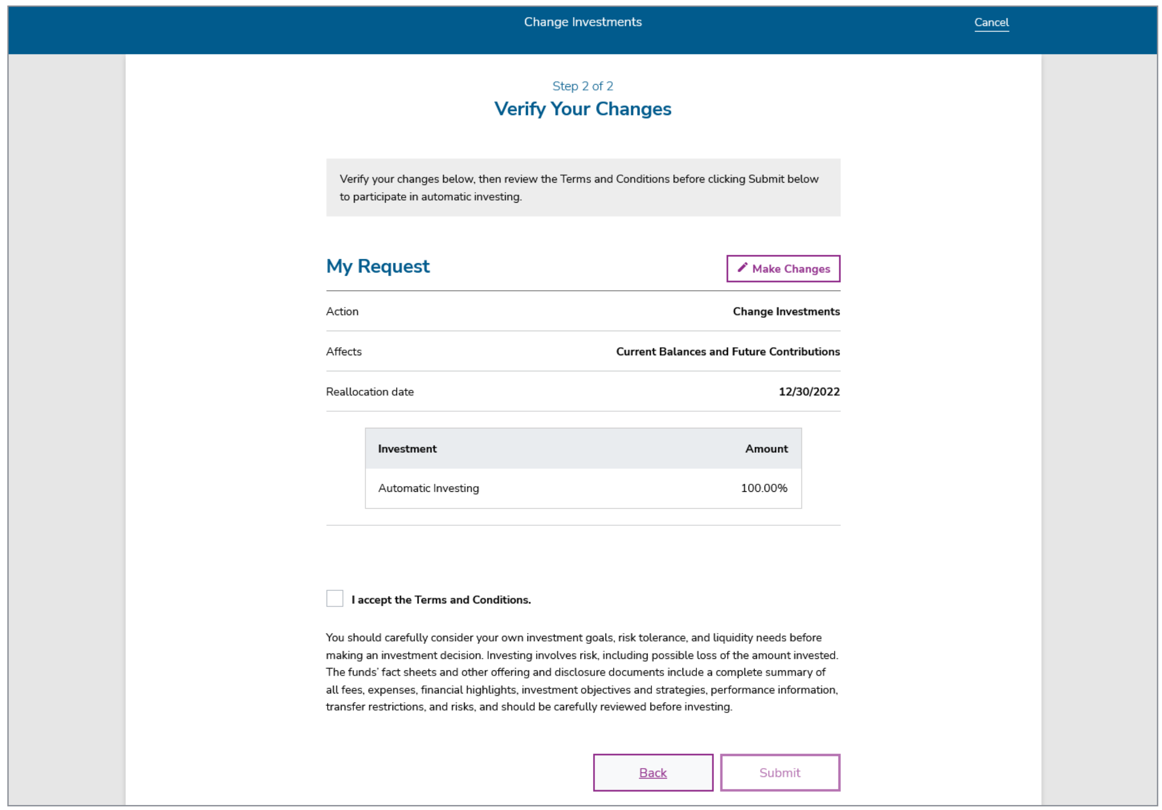


Change investments and allocations

When electing an automatic investing option, your future allocations into the investment type will listed under the Investment field shown to the right.

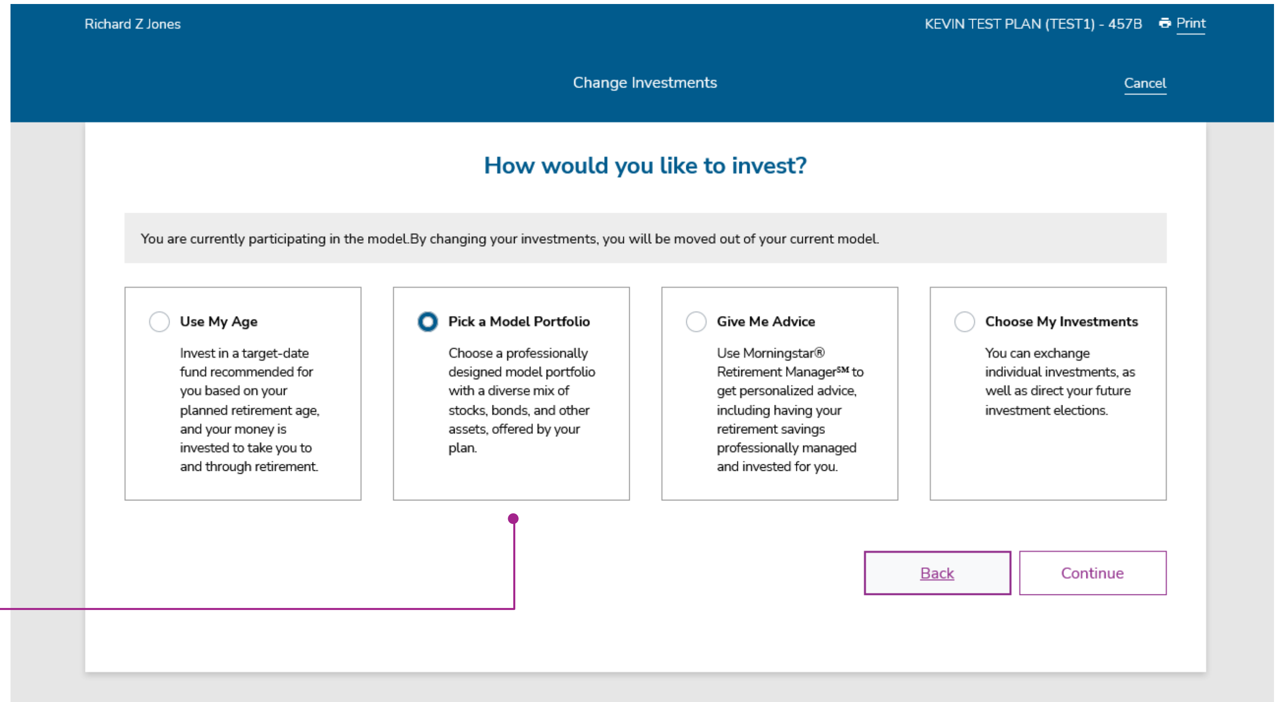


Step 2 of this process will ask you to verify your changes.



Change investments and allocations – Pick a Model Portfolio

If you select the Model Portfolio option, your current and future allocations will be invested in a portfolio containing a mix of stocks, bonds, and other assets offered by your plan.



Pick a Model Portfolio

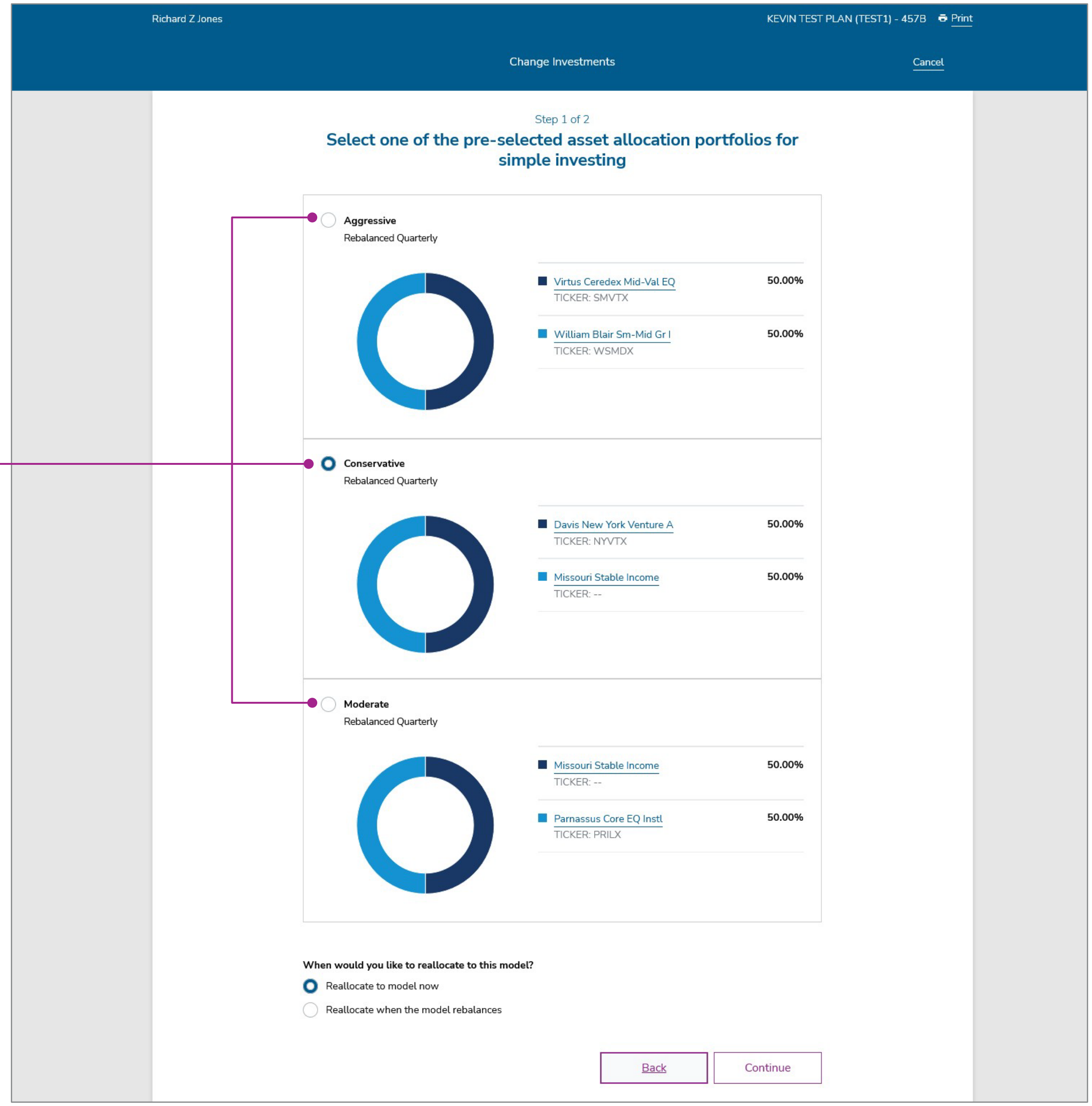
Pick a Model Portfolio Step 1

Step 1 will require you to choose one of the pre-selected asset allocation portfolios.

Choose one by selecting one of the radio buttons and then select when you would like to reallocate to this model.

Click **Continue** when finished.

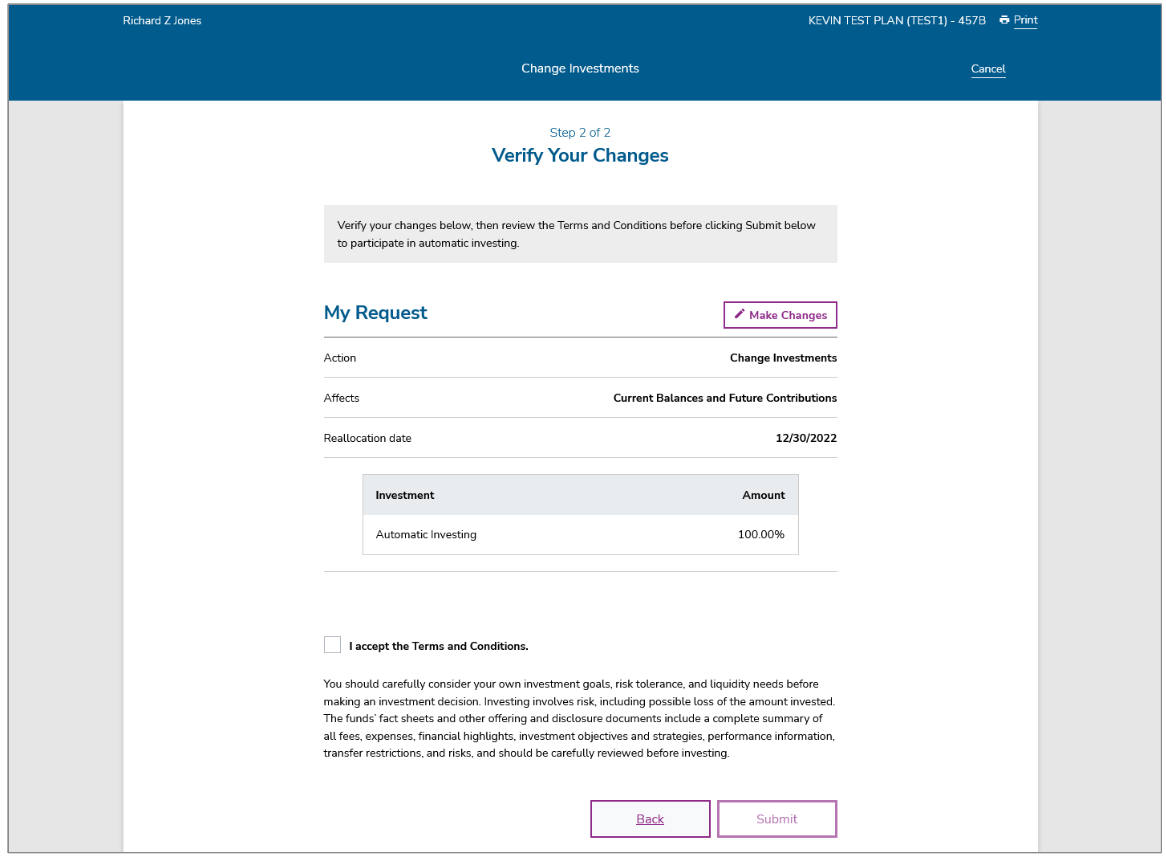
Pre-selected asset allocation portfolio options



Pick a Model Portfolio Step 2

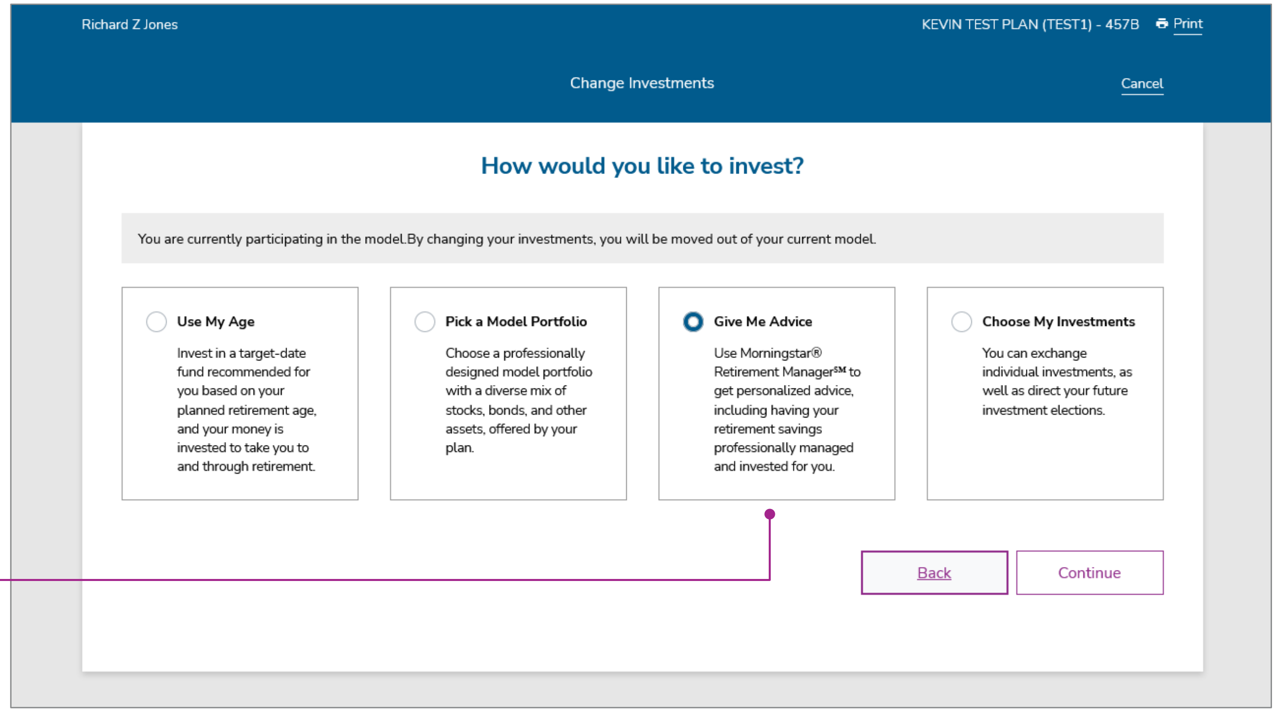
Step 2 includes the verification of your selection and an option to make changes to your request.

Be sure to review the Terms and Conditions before submitting your request.



Change investments and allocations – Give Me Advice

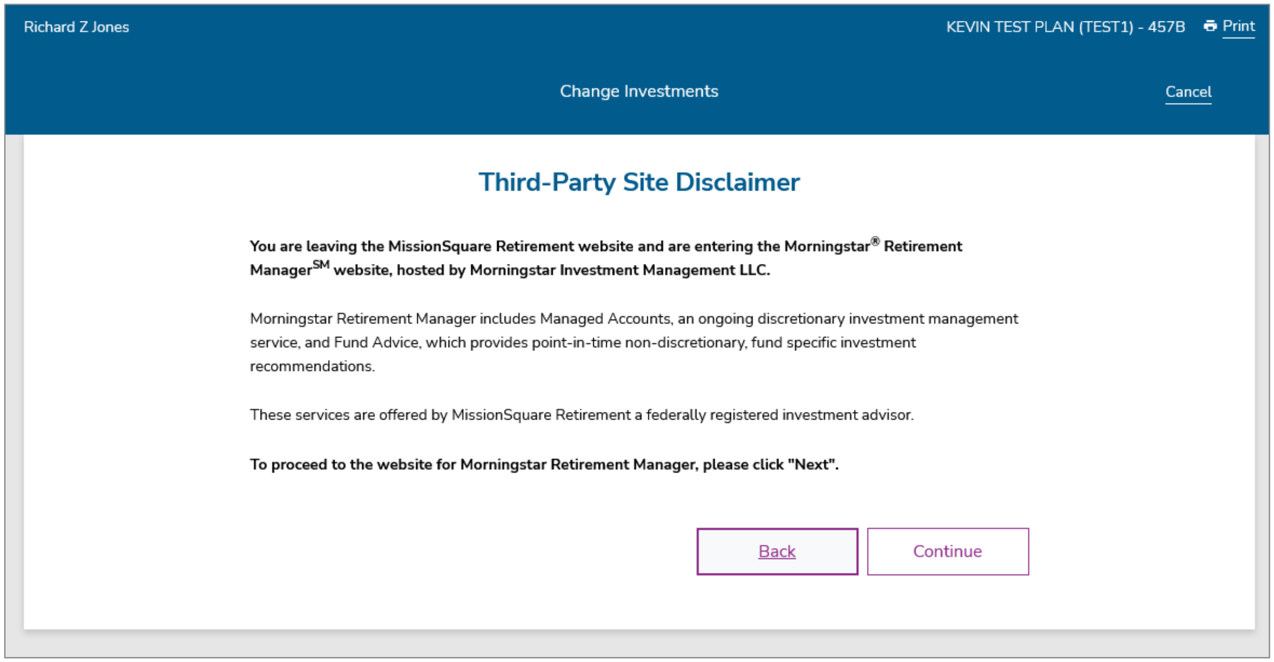
This option will use the Morningstar® Retirement Manager℠ to get personalized advice, including having your retirement savings professionally managed and invested for you.



Give Me Advice

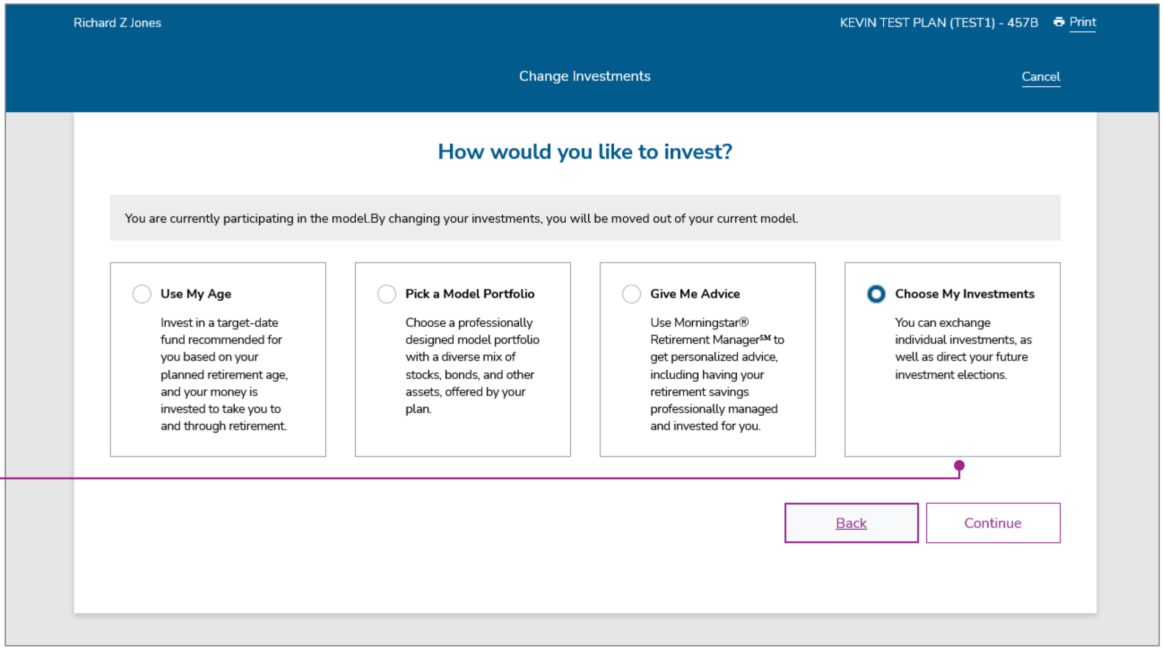
Please note that by continuing with this option you will leave the MissionSquare Retirement website and will enter the Morningstar® Retirement Manager℠ which is hosted by Morningstar Investment Management LLC.

Click **Continue** to proceed.



Change investments and allocations – Choose My Investments

This option allows you to exchange your individual investments, as well as direct your future election options.



Choose My Investments

This screen provides options to either:

- Switch your current investments
- Rebalance your portfolio
- Switch where your future contributions are invested

Select one option by clicking on it's corresponding radio button and click **Continue** to continue the process.