



LifeStage Personal Investment Profile

Part 1 – Participant Information

Name _____ Social Security # _____
Address _____ Primary phone # _____
_____ E-mail address _____
Country of citizenship _____

Part 2 – LifeStage Personal Investment Profile

The LifeStage Investment Management Service (LifeStage) is an investment management tool that determines your investment fund allocation based on your age, your General Board account balances, expected Social Security benefits (if applicable) and the answers to your *LifeStage Personal Investment Profile*. You may make selections for your profile or you may choose the LifeStage default profile. Please refer to the brochure *General Board Investing Opportunities* for more information.

To make the selections for your profile, please answer the following questions. Questions 3 and 4 apply only to clergy participants in the Ministerial Pension Plan (MPP). You may change these variables as often as you wish.

1. My risk tolerance is: Conservative Moderate Aggressive
(The default setting is Moderate.)
 2. I will qualify to receive Social Security benefits when I retire: Yes No
(The default setting is Yes.)
 3. I anticipate beginning to receive Ministerial Pension Plan (MPP) monthly benefit payments at age: _____ (enter age)
(The default setting is Social Security Normal Retirement Age.)
 4. I intend to annuitize _____ % of my MPP account at retirement.
(At least 65% must be annuitized. The default percentage is 100%.)
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Part 3 – Signature

I have received a copy of *General Board Investing Opportunities* explaining the implications of the elections I have made above. I understand and accept the actions I have taken with this election form.

Signature _____ Date _____

