

Change Investment Elections:

On your home page click "View/change my investments"

Account Summary:
Total Balance: \$33,604.57
Last Contribution: \$120.00
YTD Return: 09/30/2015: -4.00%

MY ASSET ALLOCATION

My Current Allocation (View: ASSET CLASS)

Asset Class	Percentage
Stock	79.86%
Bond	20.14%

I WANT TO...

- Get a statement
- Change my profile
- Change contributions
- View/change my investments** (indicated by a red arrow)
- Check my performance
- Withdraw money
- Research investment options

Next click "Change Investments"

My Portfolio (CHANGE INVESTMENTS button highlighted with a red arrow)

Holdings | Elections | Performance | My Model

You are currently participating in the **Index Portfolio 80** model. This model is designed to apply designated allocations to rebalancing your account **Quarterly**. The next rebalance date is 01/15/2016.

My Elections

DFA US Small Cap	16.00%
DFA US Targeted Value	16.00%
DFA US Large Cap Value	10.00%
DFA US Large Company	10.00%
DFA Five-Year Global Fixed Income	5.00%
DFA International Small Cap Value	5.00%
DFA One-Year Fixed Income	5.00%
DFA Short-Term Government	5.00%
DFA Two-Year Global Fixed Income	5.00%
Other	23.00%

Choose "Model Portfolio" and click Continue

Change My Investments

SCIENTIFIC PLATERS OF N. CA, INC.

1 Tell us how you would like to invest.

2 Select your investments.

3 Verify and submit your changes.

Tell us how you would like to invest.

You are currently participating in a **Index Portfolio 80** model. This model is designed to apply designated allocations to rebalancing your account **Quarterly**. The next rebalance date is **01/15/2016**. By changing your investments, you will be moved out of your current model.

Automatic Investing
Automatic Investing-Your money is automatically rebalanced and invested in the portfolio created for your company.

Model Portfolio
Your money is invested in a model portfolio designed to meet your financial goals and risk tolerance. Each model portfolio has its own rebalancing schedule.

My Own Investment Choices
You want to make your own investment choices.

CANCEL (left) | CONTINUE (right, highlighted with a red arrow)

Select the Model Portfolio you want and “Reallocate to model now” button and click Continue

The screenshot shows a user interface for selecting a model portfolio. It features two pie charts representing different portfolios: "Index Portfolio 80 Rebalanced Quarterly" and "Index Portfolio 90 Rebalanced Quarterly". Each portfolio has a "View this Portfolio" link. Below the portfolios are two radio button options: "Reallocate to model now" (which is selected) and "Reallocate when the model rebalances". At the bottom, there are three buttons: "BACK", "CANCEL", and "CONTINUE". Red arrows are overlaid on the image to highlight the selection process: one points to the first portfolio, another to the "Reallocate to model now" radio button, and a third to the "CONTINUE" button.

Next Verify and submit the changes