

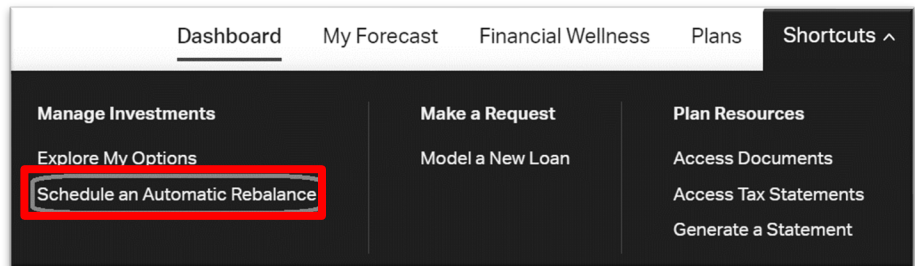
Schedule Automatic Rebalancing

Automated Account Rebalancing redistributes your account balances according to your investment elections at the time of rebalancing, and on a frequency of your choice.

STEP 1

From the Dashboard:

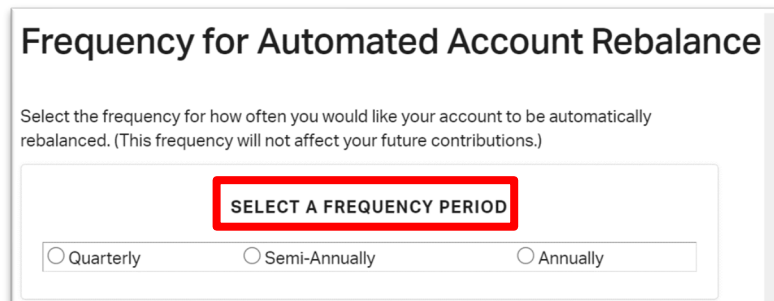
- Select the *Shortcuts* menu
- Choose *Schedule an Automatic Rebalance*
- Agree to the Terms and Conditions



STEP 2

Choose Your Frequency:

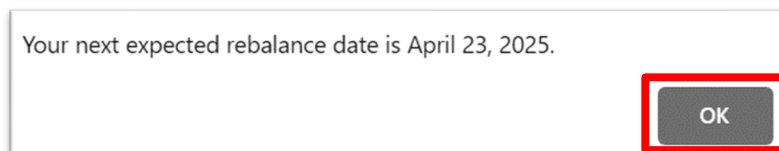
- Quarterly
- Semi-Annually
- Annually

A screenshot of a form titled 'Frequency for Automated Account Rebalance'. Below the title, there is a sub-header and a paragraph: 'Select the frequency for how often you would like your account to be automatically rebalanced. (This frequency will not affect your future contributions.)'. Below this text is a large button labeled 'SELECT A FREQUENCY PERIOD' in all caps, which is highlighted with a red rectangular box. Underneath the button are three radio button options: 'Quarterly', 'Semi-Annually', and 'Annually'.

STEP 3

Expected Rebalance Date:

- Confirm your Expected Rebalance Date
- Agree to the Terms and Conditions
- Select Submit

A screenshot of a confirmation box. The text inside reads: 'Your next expected rebalance date is April 23, 2025.' In the bottom right corner of the box, there is a grey button labeled 'OK', which is highlighted with a red rectangular box.