

# Hypothetical Investment Menu

Column A (default)	Column B Core Asset-Class Choices	Self-Directed Account-Mutual Fund Window
<p><b>Age-based Target Retirement Fund</b> (assuming retirement at age 65, unless otherwise indicated)</p> <p style="text-align: right;">Check one box</p>	<p style="text-align: right;">Check one box</p>	<p><i>Examples</i></p>
<p>Target Retirement 2015 Fund <input type="checkbox"/></p>	<p><b>A. Diversified</b> (based on self-identified risk tolerance)</p>	<p>Vanguard menu</p>
<p>Target Retirement 2020 Fund <input type="checkbox"/></p>	<p><b>Conservative</b> (low tolerance for risk) <input type="checkbox"/></p>	<p>Fidelity menu</p>
<p>Target Retirement 2025 Fund <input type="checkbox"/></p>	<p><b>Average</b> (average tolerance for risk) <input type="checkbox"/></p>	<p>American Funds menu</p>
<p>Target Retirement 2030 Fund <input type="checkbox"/></p>	<p><b>Aggressive</b> (above average tolerance for risk) <input type="checkbox"/></p>	<p>American Century menu</p>
<p>Target Retirement 2035 Fund <input type="checkbox"/></p>	<hr/> <p><b>B. Core Asset Classes</b></p>	<p>TIAA-CREF menu</p>
<p>Target Retirement 2040 Fund <input type="checkbox"/></p>	<p>Social Choice</p>	<p>Etc. &amp; at no additional fee</p>
<p>Target Retirement 2045 Fund <input type="checkbox"/></p>	<p>Short-term Bond</p>	<p>(If these are not included elsewhere on menu)</p>
	<p>Intermediate-term Bond</p>	
	<p>Inflation-Indexed Securities</p>	
	<p><b>Size-based, Style-based</b> (e.g., large, mid, or small cap; value or growth)</p>	