

4 Investment Portfolio Information

You may direct your contribution to an existing Investment Portfolio or into a new Investment Portfolio, which will be opened upon receipt of this contribution. The minimum contribution is \$25 per Investment Option. See the *Disclosure Booklet* for more information including the Maximum Contribution Limit.

Select the Class of Units to be purchased

- Class A Units with initial sales charge.
- Class C Units with contingent deferred sales charge.
- Class A Units with waived initial sales charge. (Please indicate reason below.)
- Current or retired employee or director of eligible dealer/firm, or immediate family member of any such person (identify dealer/firm below)
 - Fee-based Account
 - Employee of Selling Institution or immediate family member of any such person (identify dealer/firm below): By checking this box, I certify that I am an employee for at least the last 90 days of a Selling Institution, or an immediate family member of any such person, and therefore qualify to purchase Class A Units at Net Unit Value as outlined in the Disclosure Booklet and the Participation Agreement.

Investment Portfolios	Contribution Amount(s)									
Age-Based Investment Portfolio	\$									
Capital Appreciation Portfolio <i>(Class A Fund 6518) (Class C Fund 6519)</i>	\$									
Conservative Allocation Portfolio <i>(Class A Fund 6520) (Class C Fund 6521)</i>	\$									
Oakmark International Portfolio <i>(Class A Fund 6522) (Class C Fund 6523)</i>	\$									
Santa Barbara Dividend Growth <i>(Class A Fund 6524) (Class C Fund 6525)</i>	\$									
Harding Loevner Global Equity <i>(Class A Fund 6526) (Class C Fund 6527)</i>	\$									
Nuveen Strategic Income Portfolio <i>(Class A Fund 6528) (Class C Fund 6529)</i>	\$									
Nuveen Inflation-Linked Portfolio <i>(Class A Fund 6530) (Class C Fund 6531)</i>	\$									
Principal Plus Interest Portfolio <i>(Class A fund 6532) (Class C Fund 6533)</i>	\$									
MetWest Total Return Bond Portfolio <i>(Class A Fund 6534) Class C Fund 6535)</i>	\$									
TIAA Large Cap U.S. Equity Index Portfolio <i>(Class A Fund 6536) (Class C Fund 6537)</i>	\$									
TIAA U.S. Small Cap Portfolio <i>(Class A Fund 6538) (Class C Fund 6539)</i>	\$									
TIAA Large Cap Value Portfolio <i>(Class A Fund 6540) (Class C Fund 6541)</i>	\$									
Harbor Capital Appreciation Portfolio <i>(Class A Fund 6542) (Class C Fund 6543)</i>	\$									
Ariel Portfolio <i>(Class A Fund 6544) (Class C Fund 6545)</i>	\$									
DFA Emerging Markets Portfolio <i>(Class A Fund 6546) (Class C Fund 6547)</i>	\$									
Nuveen Alternative Income Portfolio <i>(Class A Fund 6548) (Class C Fund 6549)</i>	\$									
TIAA Social Choice Equity Portfolio <i>(Class A Fund 6550) (Class C Fund 6551)</i>	\$									
TIAA Social Choice Bond Portfolio <i>(Class A Fund 6552) (Class C Fund 6553)</i>	\$									
Nuveen Real Asset Income Portfolio <i>(Class A Fund 6554) (Class C Fund 6555)</i>	\$									
TOTAL	\$									

Mail This Form To:

Via regular mail:

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