

Move Money

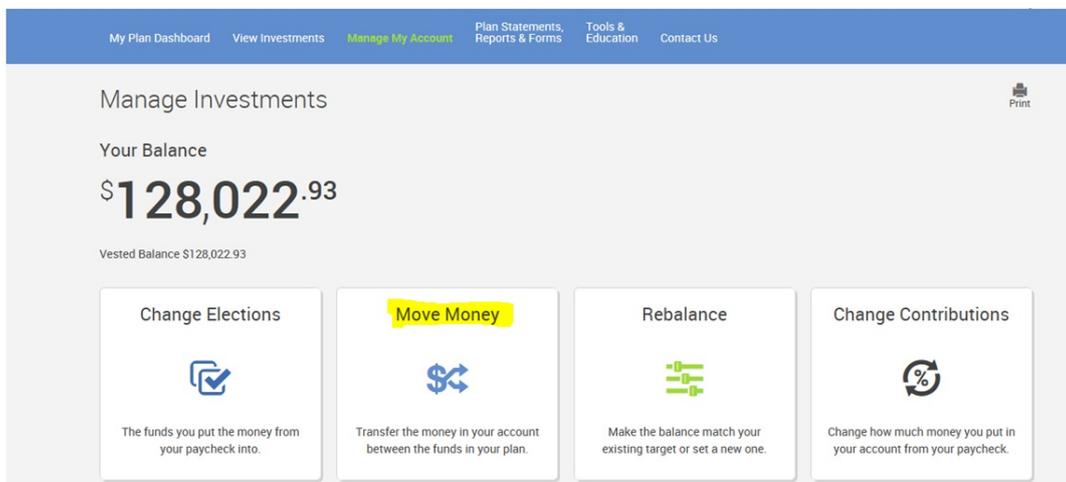
[Show Me How to Transfer Between Investments](#)

To manage your investments or contributions, choose **Manage Investments** from the **Manage My Account** menu.

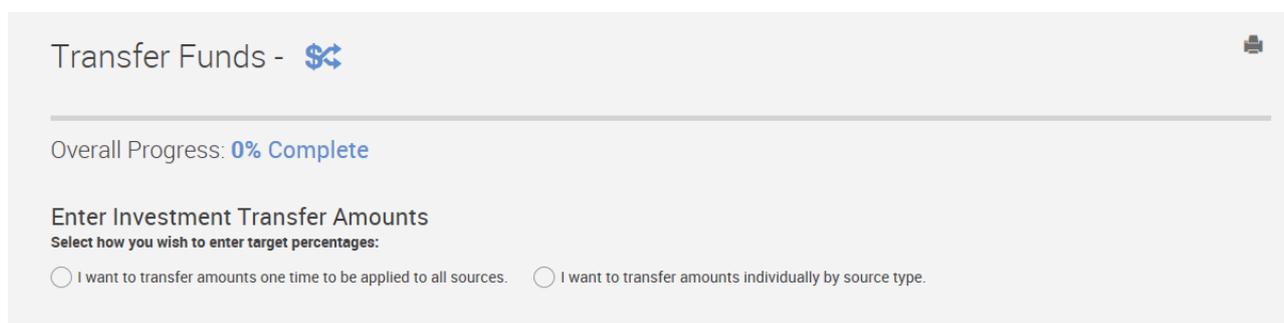
From here you can update your future investment elections by selecting **Change Elections**, you can **Rebalance** your entire account by realigning your fund percentages, or you can **Move Money**, which allows you to move specific funds or a portion of a fund into another fund(s).

MOVE MONEY

1. Select Move Money from the Manage Investments menu.



2. Most plans will provide you with the option of moving all sources of money at once or transferring amounts by source individually. (Some plans do not give the option and you will need to make your elections in each source.)



3. Once you have selected source option, select transfer type. Not all plans offer all types of transfers so there may only be one option in this section.

Transfer types include:

- Percentage to Percentage
- Dollar to Dollar
- Dollar to Percentage.

Whichever option is selected is the format you will use to enter your transfer request.

Select transfer type

Percentage to Percentage

4. Scroll down the page until you are able to view the available funds in your plan. Select the percentage (or dollar if you have elected this type of transfer) you would like to move **From** the fund.

****Please note - If you want to move all assets from a particular fund you will need to enter 100% in the From column**.**

5. You must then enter the percentage (or dollar amount) in the **To** column of the fund you want the assets to be transferred to.

The **To column must ALWAYS equal 100% (or match the dollar amount in the from column).

6. Click **Next**.

Investment	Fund ID	Asset Class	Current Balance	From	To
Transferable Funds					
Managed Allocation - Aggressiv			0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Managed Allocation - Balanced			0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Managed Allocation - Conservat			64.55% \$69,734.00	<input type="text" value="0"/> %	<input type="text" value="50"/> %
Sentinel Demo Lifestyle Portfo			0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
American Century Strat Allc: C details	ACCAX	Allocation~30% to 50% Equity	0.08% \$90.16	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Vanguard International Value I details	VTRIX	Foreign Large Value	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Columbia Acorn International I details	ACINX	Foreign Small/Mid Growth	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Forward International Small Co details	PISRXX	Foreign Small/Mid Growth	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="10"/> %
Prudential Global Real Estate details	PURZXX	Global Real Estate	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Westcore Plus Bond Retail details	WTIBXX	Intermediate-Term Bond	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
First Eagle US Value A details	FEVAX	Large Blend	13.01% \$14,056.81	<input type="text" value="100"/> %	<input type="text" value="0"/> %
IIT Sector Allocation Model details	SAMSXX	Large Blend	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Prudential Jennison Mid-Cap Gr details	PEGZXX	Mid-Cap Growth	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="20"/> %
Goldman Sachs Mid Cap Value A details	GCMAX	Mid-Cap Value	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="20"/> %
Absolute Strategies I details	ASFIX	Multialternative	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
test fund for web with . in fu	ABC.D	None	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Test Red. Fee ID	DUMMY	None	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
BlackRock Strategic Income Opp details	BSIIX	Nontraditional Bond	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Keelev Small Cap Value A details	KSCVXX	Small Blend	0.00% \$0.00	<input type="text" value="0"/> %	<input type="text" value="0"/> %

**If you are moving funds individually by source you will need to complete the above step in each source. Check the Include box and expand the source to enter your elections.

- > Employer Profit Sharing Include
- > Employee Pre-tax Contributions Include
- > Rollover Include
- > Employer Matching Contribution Include

> Employer Profit Sharing

Include

∨ Employee Pre-tax Contributions

Include

Investment	Fund ID	Asset Class	Current Balance	From	To
Transferable Funds					
Managed Allocation - Aggressiv			0.00%	\$0.00	0 %
Managed Allocation - Balanced			0.00%	\$0.00	0 %
Managed Allocation - Conservat			0.00%	\$0.00	0 %
Sentinel Demo Lifestyle Portfo			0.00%	\$0.00	0 %
American Century Strat Allc: C	details ACCAX	Allocation~30% to 50% Equity	3.38%	\$87.37	0 %
Vanguard International Value I	details VTRIX	Foreign Large Value	0.00%	\$0.00	0 %
Columbia Acorn International I	details ACINX	Foreign Small/Mid Growth	0.00%	\$0.00	0 %
Forward International Small Co	details PISRX	Foreign Small/Mid Growth	0.00%	\$0.00	0 %
Prudential Global Real Estate	details PURZX	Global Real Estate	0.00%	\$0.00	0 %
Westcore Plus Bond Retail	details WTIBX	Intermediate-Term Bond	0.00%	\$0.00	0 %
First Eagle US Value A	details FEVAX	Large Blend	0.00%	\$0.00	0 %
IIT Sector Allocation Model	details SAMSX	Large Blend	0.00%	\$0.00	0 %
Prudential Jennison Mid-Cap Gr	details PEGZX	Mid-Cap Growth	0.00%	\$0.00	0 %
Goldman Sachs Mid Cap Value A	details GCMAX	Mid-Cap Value	0.00%	\$0.00	0 %

7. Proceed through the steps to complete your transaction. Click **Submit**. You will receive a 6-digit confirmation number to confirm you transaction is complete.

In most cases, transactions submitted before 4PM will be processed for that business days. Transactions submitted after 4PM will be processed the following business day.

****Important Note:** This transaction will only move the existing money in your account. If you also need to update future money coming into your account you will need to [Update Investment Elections](#) also.