

How To ...

Request an Existing Fund Transfer

- Once you have logged into the Employee website -
 - ✓ From the Menu Tabs across the top select **Transactions** and then **Transfer Existing Savings**.



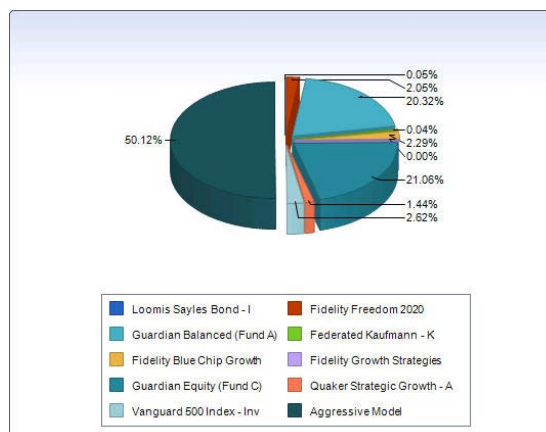
- You will have the option of selecting the **Transfer Type** to submit. There are four standard options to choose from -
 - ✓ **Percent** - You will choose a percentage of your existing funds to transfer into any funds.
 - ✓ **Dollar** - You will choose a dollar amount of your existing funds to transfer into any funds. (PLEASE NOTE: You may be restricted to selling a percentage of the assets in any fund to account for market fluctuation. If you would like to sell 100% of a fund, please select one of the other Transfer Types.)
 - ✓ **Reallocation** - You will choose the percentages you want to end up with in any funds.
 - ✓ **Rebalance** - Your account will be rebalanced to match the percentages specified in your existing Investment Elections for future contributions.
- Based on type of Transfer you choose follow the steps outlined below.

Percent Transfer

- Select the **Transfer Type** by clicking on the drop down arrow and selecting **Percent**. (NOTE - This is the default option and is automatically selected.)



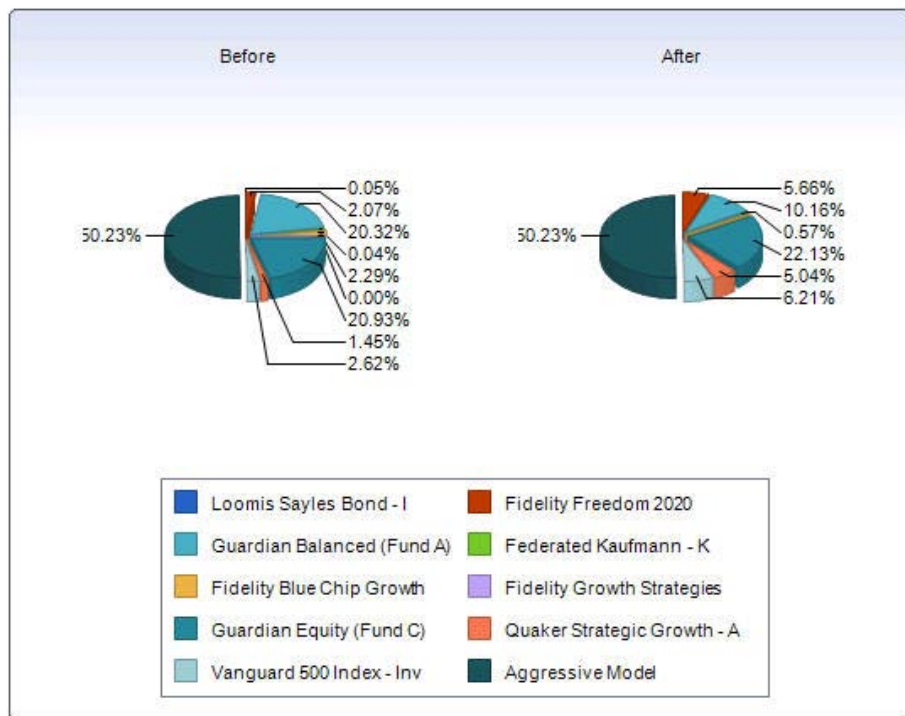
- Below this section you will see a chart showing your current holdings by fund and percent.



- Scroll down and complete the % of Each Fund Balance to be Transferred Out column by entering the percent to sell from any fund you currently have holdings in, (enter number only do not include percent sign "%").
- Complete the % of Total Dollar Amount to be Transferred In column by entering the percents to buy from any of the available funds, (enter number only do not include percent sign "%"), making sure that the amounts add up to 100.
- Click **Submit**.

Fund	Market Value	Available for Transfer	% of Each Fund Balance to be Transferred Out	% of Total Dollar Amount to be Transferred In
Loomis Sayles Bond - I	\$96.00	\$96.00	<input type="text" value="100"/>	<input type="text"/>
Fidelity Freedom 2020	\$3,672.47	\$3,672.47	<input type="text"/>	<input type="text" value="30"/>
Guardian Balanced (Fund A)	\$36,317.10	\$36,317.10	<input type="text" value="50"/>	<input type="text"/>
Federated Kaufmann - K	\$67.98	\$67.98	<input type="text" value="100"/>	<input type="text"/>
Fidelity Blue Chip Growth	\$4,084.33	\$4,084.33	<input type="text" value="75"/>	<input type="text"/>
Fidelity Growth Strategies	\$6.28	\$6.28	<input type="text" value="100"/>	<input type="text"/>
Guardian Equity (Fund C)	\$37,629.48	\$37,629.48	<input type="text"/>	<input type="text" value="10"/>
Quaker Strategic Growth - A	\$2,573.20	\$2,573.20	<input type="text"/>	<input type="text" value="30"/>
Vanguard 500 Index - Inv	\$4,690.28	\$4,690.28	<input type="text"/>	<input type="text" value="30"/>
Aggressive Model	\$89,582.54	\$89,582.54	<input type="text"/>	<input type="text"/>

- Your request will be reviewed and the website will then show you a Before and After chart representing the percent by fund of your existing holdings versus your new holdings after the transfer. PLEASE NOTE: At the point your change has not been completed, please continue with the next steps.



- Continue scrolling down to review the changes you submitted. If everything is in order, Click the *Confirm* button.

Fund	Market Value	Available for Transfer	% of Each Fund Balance to be Transferred Out	% of Total Dollar Amount to be Transferred In
Loomis Sayles Bond - I	\$96.00	\$96.00	100%	
Fidelity Freedom 2020	\$3,672.47	\$3,672.47		30%
Guardian Balanced (Fund A)	\$36,317.10	\$36,317.10	50%	
Federated Kaufmann - K	\$67.98	\$67.98	100%	
Fidelity Blue Chip Growth	\$4,084.33	\$4,084.33	75%	
Fidelity Growth Strategies	\$6.28	\$6.28	100%	
Guardian Equity (Fund C)	\$37,629.48	\$37,629.48		10%
Quaker Strategic Growth - A	\$2,573.20	\$2,573.20		30%
Vanguard 500 Index - Inv	\$4,690.28	\$4,690.28		30%
Aggressive Model	\$89,582.54	\$89,582.54		

[Confirm](#)

- The website will return a message verifying that the change was made and the date it occurred.
- If the request was Confirmed prior to your plan specific Cutoff Time, the transaction will be initiated that business day. Otherwise it will be postponed until the following business day.
- By scrolling down you will be able to review the details of the transfer you requested.
- If you change your mind and would like to delete the transfer request you just made, Click the *Delete* button.

SELECT TRANSFER TYPE:

Your transaction was successfully entered on **Friday, March 26, 2010 05:30:38 PM (EST)**

This transaction was entered after the **2:00:00 PM** cutoff time and will be processed the next business day.

If you have any questions regarding this transaction please call customer service and have the above information ready.

Reference No : **1358728**
 Plan Cutoff Date/Time : **2:00:00 PM**
 Transaction Date/Time : **Friday, March 26, 2010 05:30:38 PM (EST)**

Transfer Details			
Fund Description	Amount	Percent	Units
Federated Kaufmann - K	\$0.00	-100	0.00
Fidelity Blue Chip Growth	\$0.00	-75	0.00
Fidelity Freedom 2020	\$6,417.61	30	0.00
Fidelity Growth Strategies	\$0.00	-100	0.00
Guardian Balanced (Fund A)	\$0.00	-50	0.00
Guardian Equity (Fund C)	\$2,139.21	10	0.00
Loomis Sayles Bond - I	\$0.00	-100	0.00
Quaker Strategic Growth - A	\$6,417.62	30	0.00
Vanguard 500 Index - Inv	\$6,417.62	30	0.00

[Delete](#)

- If after exiting this screen (or logging off) you decide that you didn't want to process this transaction, you have until the Cutoff Time on the date your transaction will trade to delete the transaction. Simply access the Transfer Existing Savings screen and Click the *Delete* button.

**You already have a pending transfer request.
You must first delete the existing request before you can initiate another.**

Transfer Details			
Fund Description	Amount	Percent	Units
Federated Kaufmann - K	\$0.00	-100	0.00
Fidelity Blue Chip Growth	\$0.00	-75	0.00
Fidelity Freedom 2020	\$6,417.61	30	0.00
Fidelity Growth Strategies	\$0.00	-100	0.00
Guardian Balanced (Fund A)	\$0.00	-50	0.00
Guardian Equity (Fund C)	\$2,139.21	10	0.00
Loomis Sayles Bond - I	\$0.00	-100	0.00
Quaker Strategic Growth - A	\$6,417.62	30	0.00
Vanguard 500 Index - Inv	\$6,417.62	30	0.00

[Delete](#)

Dollar Transfer

- Select the Transfer Type by clicking on the drop down arrow and selecting Dollar.

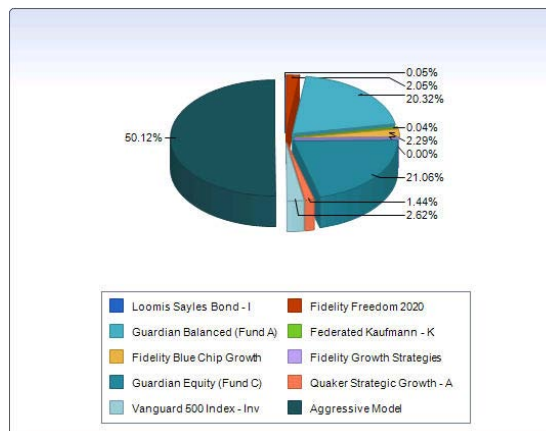
Transfer Existing Savings: Dollar

SELECT TRANSFER TYPE: Dollar ▼

- Percent
- Dollar
- Reallocation
- Rebalance

Transfers using funds marked with a red asterisk (*) may incur redemption fees

- Below this section you will see a chart showing your current holdings by fund and percent.



- Scroll down and complete the **From Dollar** column by entering the dollar amount to sell from any fund you currently have holdings in, (*enter number only do not include dollar sign "\$"*).
- Complete the **To Dollar** column by entering the dollar amounts to buy from any of the available funds, (*enter number only do not include dollar sign "\$"*), making sure that the amounts add up to your **From Dollar** column.
- Click **Submit**.

Fund	Market Value	Available for Transfer	From Dollar	To Dollar
Loomis Sayles Bond - I	\$96.00	\$96.00	40.00	
Fidelity Freedom 2020	\$3,672.47	\$3,672.47		
Guardian Balanced (Fund A)	\$36,317.10	\$36,317.10		
Federated Kaufmann - K	\$67.98	\$67.98	30.00	
Fidelity Blue Chip Growth	\$4,084.33	\$4,084.33		
Fidelity Growth Strategies	\$6.28	\$6.28		15070.00
Guardian Equity (Fund C)	\$37,629.48	\$37,629.48	15000.00	
Quaker Strategic Growth - A	\$2,573.20	\$2,573.20		
Vanguard 500 Index - Inv	\$4,690.28	\$4,690.28		
Aggressive Model	\$89,582.54	\$89,582.54		

- Your request will be reviewed and the website will then show you a Before and After chart representing the percent by fund of your existing holdings versus your new holdings after the transfer. PLEASE NOTE: At the point your change has not been completed, please continue with the next steps.



- Continue scrolling down to review the changes you submitted. If everything is in order, Click the *Confirm* button.

Fund	Market Value	Available for Transfer	From Dollar	To Dollar
Loomis Sayles Bond - I	\$96.00	\$96.00	\$40.00	
Fidelity Freedom 2020	\$3,672.47	\$3,672.47		
Guardian Balanced (Fund A)	\$36,317.10	\$36,317.10		
Federated Kaufmann - K	\$67.98	\$67.98	\$30.00	
Fidelity Blue Chip Growth	\$4,084.33	\$4,084.33		
Fidelity Growth Strategies	\$6.28	\$6.28		\$15,070.00
Guardian Equity (Fund C)	\$37,629.48	\$37,629.48	\$15,000.00	
Quaker Strategic Growth - A	\$2,573.20	\$2,573.20		
Vanguard 500 Index - Inv	\$4,690.28	\$4,690.28		
Aggressive Model	\$89,582.54	\$89,582.54		

[Confirm](#)

- The website will return a message verifying that the change was made and the date it occurred.
- If the request was Confirmed prior to your plan specific Cutoff Time, the transaction will be initiated that business day. Otherwise it will be postponed until the following business day.
- By scrolling down you will be able to review the details of the transfer you requested.
- If you change your mind and would like to delete the transfer request you just made, Click the *Delete* button.

SELECT TRANSFER TYPE:

Your transaction was successfully entered on **Monday, March 29, 2010 09:32:33 AM (EST)**

If you have any questions regarding this transaction please call customer service and have the above information ready.

Reference No : **1358732**
 Plan Cutoff Date/Time : **2:00:00 PM**
 Transaction Date/Time : **Monday, March 29, 2010 09:32:33 AM (EST)**

Transfer Details			
Fund Description	Amount	Percent	Units
Federated Kaufmann - K	(\$30.00)	0	0.00
Fidelity Growth Strategies	\$15,070.00	0	0.00
Guardian Equity (Fund C)	(\$15,000.00)	0	0.00
Loomis Sayles Bond - I	(\$40.00)	0	0.00

[Delete](#)

- If after exiting this screen (or logging off) you decide that you didn't want to process this transaction, you have until the Cutoff Time on the date your transaction will trade to delete the transaction. Simply access the Transfer Existing Savings screen and Click the *Delete* button.

**You already have a pending transfer request.
You must first delete the existing request before you can initiate another.**

Transfer Details			
Fund Description	Amount	Percent	Units
Federated Kaufmann - K	(\$30.00)	0	0.00
Fidelity Growth Strategies	\$15,070.00	0	0.00
Guardian Equity (Fund C)	(\$15,000.00)	0	0.00
Loomis Sayles Bond - I	(\$40.00)	0	0.00

Delete

Reallocation Transfer

- Select the Transfer Type by clicking on the drop down arrow and selecting Reallocation.

Transfer Existing Savings: Reallocation

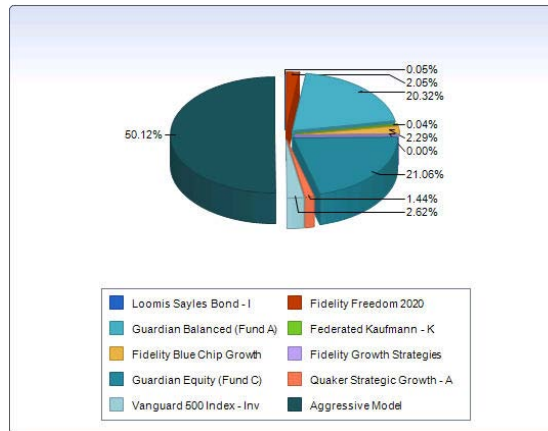
SELECT TRANSFER TYPE: Reallocation ▼

Percent
 Dollar
Reallocation
 Rebalance

Transfers using funds marked with a red asterisk (*) may incur redemption fees

Note: Please enter Percent values in 1% increments.

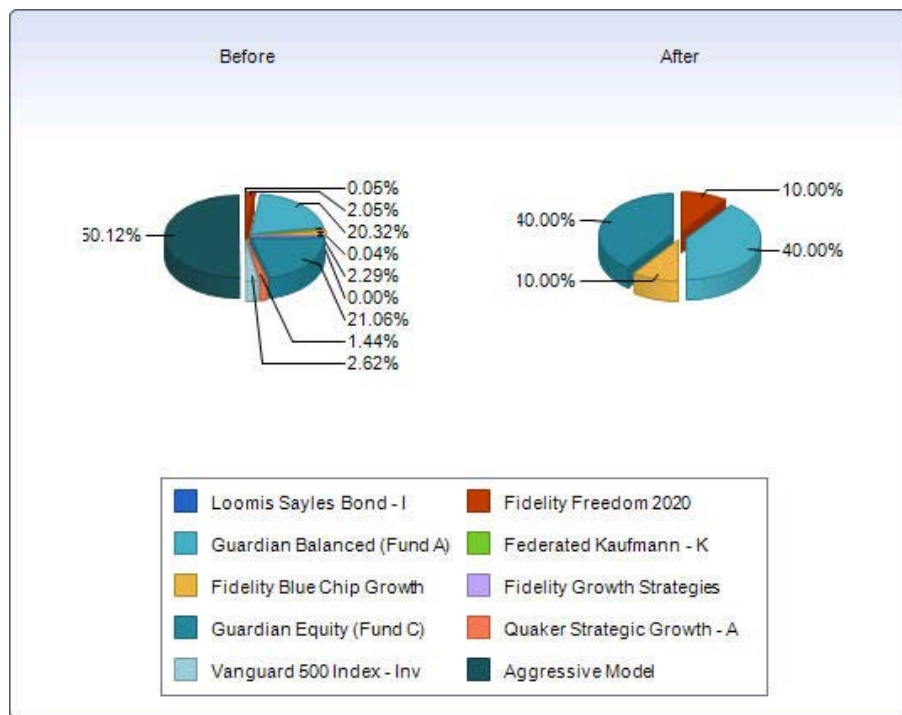
- Below this section you will see a chart showing your current holdings by fund and percent.



- Scroll down and view the **Current Allocation** column which represents the percentage by fund of your exiting holdings.
- Complete the **To Percent** column by entering the percents to buy from any of the available funds, (*enter number only do not include percent sign “%”*), making sure that the amounts add up to 100.
- Click **Submit**.

Fund Description	Market Value	Available for Reallocation	Current Allocation	To Percent
Loomis Sayles Bond - I	\$96.00	\$96.00	0.05%	<input type="text"/>
Fidelity Freedom 2020	\$3,672.47	\$3,672.47	2.05%	<input type="text" value="10"/>
Guardian Balanced (Fund A)	\$36,317.10	\$36,317.10	20.32%	<input type="text" value="40"/>
Federated Kaufmann - K	\$67.98	\$67.98	0.04%	<input type="text"/>
Fidelity Blue Chip Growth	\$4,084.33	\$4,084.33	2.29%	<input type="text" value="10"/>
Fidelity Growth Strategies	\$6.28	\$6.28	0.00%	<input type="text"/>
Guardian Equity (Fund C)	\$37,629.48	\$37,629.48	21.06%	<input type="text" value="40"/>
Quaker Strategic Growth - A	\$2,573.20	\$2,573.20	1.44%	<input type="text"/>
Vanguard 500 Index - Inv	\$4,690.28	\$4,690.28	2.62%	<input type="text"/>
Aggressive Model	\$89,582.54	\$89,582.54	50.12%	<input type="text"/>

- Your request will be reviewed and the website will then show you a Before and After chart representing the percent by fund of your existing holdings versus your new holdings after the transfer. PLEASE NOTE: At the point your change has not been completed, please continue with the next steps.



- Continue scrolling down to review the changes you submitted. If everything is in order, Click the *Confirm* button.

Fund Description	Market Value	Available for Reallocation	Current Allocation	To Percent
Loomis Sayles Bond - I	\$96.00	\$96.00	0.05%	
Fidelity Freedom 2020	\$3,672.47	\$3,672.47	2.05%	10%
Guardian Balanced (Fund A)	\$36,317.10	\$36,317.10	20.32%	40%
Federated Kaufmann - K	\$67.98	\$67.98	0.04%	
Fidelity Blue Chip Growth	\$4,084.33	\$4,084.33	2.29%	10%
Fidelity Growth Strategies	\$6.28	\$6.28	0.00%	
Guardian Equity (Fund C)	\$37,629.48	\$37,629.48	21.06%	40%
Quaker Strategic Growth - A	\$2,573.20	\$2,573.20	1.44%	
Vanguard 500 Index - Inv	\$4,690.28	\$4,690.28	2.62%	
Aggressive Model	\$89,582.54	\$89,582.54	50.12%	

[Confirm](#)

- The website will return a message verifying that the change was made and the date it occurred.
- If the request was Confirmed prior to your plan specific Cutoff Time, the transaction will be initiated that business day. Otherwise it will be postponed until the following business day.
- By scrolling down you will be able to review the details of the transfer you requested.
- If you change your mind and would like to delete the transfer request you just made, Click the *Delete* button.

SELECT TRANSFER TYPE: Reallocation

Your transaction was successfully entered on **Monday, March 29, 2010 10:13:34 AM (EST)**

If you have any questions regarding this transaction please call customer service and have the above information ready.

Reference No : **1360246**
 Plan Cutoff Date/Time : **2:00:00 PM**
 Transaction Date/Time : **Monday, March 29, 2010 10:13:34 AM (EST)**

Transfer Details			
Fund Description	Amount	Percent	Units
Aggressive Model	\$0.00	-100%	0.00
Federated Kaufmann - K	\$0.00	-100%	0.00
Fidelity Blue Chip Growth	\$0.00	-100%	0.00
Fidelity Blue Chip Growth	\$17,871.97	10%	0.00
Fidelity Freedom 2020	\$0.00	-100%	0.00
Fidelity Freedom 2020	\$17,871.97	10%	0.00
Fidelity Growth Strategies	\$0.00	-100%	0.00
Guardian Balanced (Fund A)	\$0.00	-100%	0.00
Guardian Balanced (Fund A)	\$71,487.86	40%	0.00
Guardian Equity (Fund C)	\$0.00	-100%	0.00
Guardian Equity (Fund C)	\$71,487.86	40%	0.00
Loomis Sayles Bond - I	\$0.00	-100%	0.00
Quaker Strategic Growth - A	\$0.00	-100%	0.00
Vanguard 500 Index - Inv	\$0.00	-100%	0.00

[Delete](#)

- If after exiting this screen (or logging off) you decide that you didn't want to process this transaction, you have until the Cutoff Time on the date your transaction will trade to delete the transaction. Simply access the Transfer Existing Savings screen and Click the *Delete* button.

**You already have a pending transfer request.
You must first delete the existing request before you can initiate another.**

Transfer Details			
Fund Description	Amount	Percent	Units
Aggressive Model	\$0.00	-100	0.00
Federated Kaufmann - K	\$0.00	-100	0.00
Fidelity Blue Chip Growth	\$0.00	-100	0.00
Fidelity Blue Chip Growth	\$17,871.97	10	0.00
Fidelity Freedom 2020	\$0.00	-100	0.00
Fidelity Freedom 2020	\$17,871.97	10	0.00
Fidelity Growth Strategies	\$0.00	-100	0.00
Guardian Balanced (Fund A)	\$0.00	-100	0.00
Guardian Balanced (Fund A)	\$71,487.86	40	0.00
Guardian Equity (Fund C)	\$0.00	-100	0.00
Guardian Equity (Fund C)	\$71,487.86	40	0.00
Loomis Sayles Bond - I	\$0.00	-100	0.00
Quaker Strategic Growth - A	\$0.00	-100	0.00
Vanguard 500 Index - Inv	\$0.00	-100	0.00

Rebalance Transfer

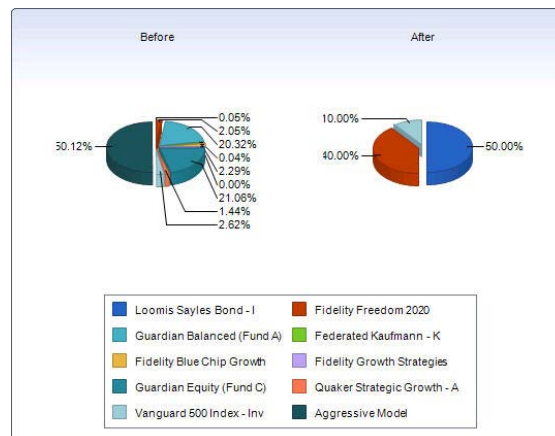
- Select the Transfer Type by clicking on the drop down arrow and selecting Rebalance.

Transfer Existing Savings: Rebalance

SELECT TRANSFER TYPE: Rebalance ▾

Transfers using funds marked with a red asterisk (*) may incur redemption fees

- Below this section you will see a chart showing your current holdings by fund and percent (Before) and how your funds will be invested after the transfer based on your Investment Elections (After).



- Scroll down and view the **Current Percent** column (*reflects percentage of current funds on existing holdings*) and **Current Allocations** column which is how your existing holdings will be invested after this transfer is completed (*based on your Investment Elections*).
- Click **Confirm**.

Fund Description	Market Value	Amount Available for Rebalance	Current Percent	Current Allocations
Loomis Sayles Bond - I	\$96.00	\$96.00	0.05%	50%
Fidelity Freedom 2020	\$3,672.47	\$3,672.47	2.05%	40%
Guardian Balanced (Fund A)	\$36,317.10	\$36,317.10	20.32%	
Federated Kaufmann - K	\$67.98	\$67.98	0.04%	
Fidelity Blue Chip Growth	\$4,084.33	\$4,084.33	2.29%	
Fidelity Growth Strategies	\$6.28	\$6.28	0.00% †	
Guardian Equity (Fund C)	\$37,629.48	\$37,629.48	21.06%	
Quaker Strategic Growth - A	\$2,573.20	\$2,573.20	1.44%	
Vanguard 500 Index - Inv	\$4,690.28	\$4,690.28	2.62%	10%
Aggressive Model	\$89,582.54	\$89,582.54	50.12%	

† indicates holdings are less than 0.005% of the total market value.

[Confirm](#)

- The website will return a message verifying that the change was made and the date it occurred.
- If the request was Confirmed prior to your plan specific Cutoff Time, the transaction will be initiated that business day. Otherwise it will be postponed until the following business day.
- By scrolling down you will be able to review the details of the transfer you requested.
- If you change your mind and would like to delete the transfer request you just made, Click the **Delete** button.

SELECT TRANSFER TYPE:

Your transaction was successfully entered on **Monday, March 29, 2010 10:25:04 AM (EST)**

If you have any questions regarding this transaction please call customer service and have the above information ready.

Reference No : **1360247**
 Plan Cutoff Date/Time : **2:00:00 PM**
 Transaction Date/Time : **Monday, March 29, 2010 10:25:04 AM (EST)**

Transfer Details			
Fund Description	Amount	Percent	Units
Aggressive Model	\$0.00	-100	0.00
Federated Kaufmann - K	\$0.00	-100	0.00
Fidelity Blue Chip Growth	\$0.00	-100	0.00
Fidelity Freedom 2020	\$0.00	-100	0.00
Fidelity Freedom 2020	\$71,487.86	40	0.00
Fidelity Growth Strategies	\$0.00	-100	0.00
Guardian Balanced (Fund A)	\$0.00	-100	0.00
Guardian Equity (Fund C)	\$0.00	-100	0.00
Loomis Sayles Bond - I	\$0.00	-100	0.00
Loomis Sayles Bond - I	\$89,359.83	50	0.00
Quaker Strategic Growth - A	\$0.00	-100	0.00
Vanguard 500 Index - Inv	\$0.00	-100	0.00
Vanguard 500 Index - Inv	\$17,871.97	10	0.00

[Delete](#)

- If after exiting this screen (or logging off) you decide that you didn't want to process this transaction, you have until the Cutoff Time on the date your transaction will trade to delete the transaction. Simply access the Transfer Existing Savings screen and Click the *Delete* button.

**You already have a pending transfer request.
You must first delete the existing request before you can initiate another.**

Transfer Details			
Fund Description	Amount	Percent	Units
Aggressive Model	\$0.00	-100	0.00
Federated Kaufmann - K	\$0.00	-100	0.00
Fidelity Blue Chip Growth	\$0.00	-100	0.00
Fidelity Freedom 2020	\$0.00	-100	0.00
Fidelity Freedom 2020	\$71,487.86	40	0.00
Fidelity Growth Strategies	\$0.00	-100	0.00
Guardian Balanced (Fund A)	\$0.00	-100	0.00
Guardian Equity (Fund C)	\$0.00	-100	0.00
Loomis Sayles Bond - I	\$0.00	-100	0.00
Loomis Sayles Bond - I	\$89,359.83	50	0.00
Quaker Strategic Growth - A	\$0.00	-100	0.00
Vanguard 500 Index - Inv	\$0.00	-100	0.00
Vanguard 500 Index - Inv	\$17,871.97	10	0.00

Delete