

FUND LINEUP – COMPLETE LIST

STEP 1: Please indicate which funds to include in the plan’s investment lineup by checking the fund in the column with an “X” to the left of each fund. A maximum of 15 mutual funds are allowed, plus one Money Market fund, from the list below. Managed Strategy and Target Date funds in the same fund family are considered one fund option.

STEP 2: Plans are required to select a default investment (mark the box with a ‘D’) and are encouraged to choose one of the highlighted funds (shaded in grey) since they meet the criteria of a Qualified Default Investment Alternative. Please consult your financial advisor for investment advice.

D	X	Domestic Equities	Symbol	Category
☐	☐	Federated Max Cap Index R	FMXXK	Large Blend
☐	☐	MFS Core Equity R2	MRERX	Large Blend
☐	☐	Nuveen Santa Barbara Dividend Growth A	NSBAX	Large Blend
☐	☐	BlackRock S&P 500 Index Investor A	BSPAX	Large Blend
☐	☐	Columbia Large Cap Growth R	CGWRX	Large Growth
☐	☐	Ivy Large Cap Growth R	WLGRX	Large Growth
☐	☐	JPMorgan Large Cap Growth R2	JLGZX	Large Growth
☐	☐	JP Morgan Large Cap Growth A	OLGAX	Large Growth
☐	☐	JP Morgan Large Cap Value R2	JLVZX	Large Growth
☐	☐	MFS Growth R2	MEGRX	Large Growth
☐	☐	MFS Growth R3	MFEHX	Large Growth
☐	☐	MFS Research R2	MSRRX	Large Growth
☐	☐	MFS Research R3	MFRHX	Large Growth
☐	☐	MFS Value R2	MVRRX	Large Value
☐	☐	JP Morgan Equity Income A	OIEIX	Large Value
☐	☐	JP Morgan Equity Income R2	OIEFX	Large Value
☐	☐	JP Morgan Mid Cap Growth R2	JMGZX	Mid-Cap Growth
☐	☐	Ivy Mid Cap Growth Y	WMGYX	Mid-Cap Growth
☐	☐	Ivy Mid Cap Growth R	WMGRX	Mid-Cap Growth
☐	☐	Janus Enterprise R	JDMRX	Mid-Cap Growth
☐	☐	Columbia Small Cap Core A	LSMAX	Small Blend
☐	☐	JP Morgan US Small Company R2	JSCZX	Small Blend
☐	☐	BlackRock Small Cap Index A	MDSKX	Small Blend
☐	☐	MFS New Discovery R2	MNDRX	Small Growth
☐	☐	MFS New Discovery R3	MNDHX	Small Growth
☐	☐	Aberdeen Small Cap R	GNSRX	Small Growth
☐	☐	Federated Kaufmann Small Cap R	FKKSX	Small Growth
☐	☐	Delaware Small Cap Core R	DCCRX	Small Growth
☐	☐	Delaware Small Cap Value A	DEVLX	Small Value
☐	☐	Delaware Small Cap Value R	DVLRX	Small Value
☐	☐	JP Morgan Undiscovered Managers Behavioral Value R2	UBVRX	Small Value
☐	☐	Wells Fargo Advantage Spec Md Cp Val A	WFPAX	Mid-Cap Value

D	X	Fixed Income	Symbol	Category
☐	☐	Eaton Vance Floating Rate A	EVBLX	Bank Loan
☐	☐	Lord Abbett Income A	LAGVX	Corporate Bond
☐	☐	Lord Abbett Income R3	LAURX	Corporate Bond
☐	☐	MFS Corporate Bond R3	MFBHX	Corporate Bond
☐	☐	MFS Corporate Bond R2	MBRRX	Corporate Bond
☐	☐	MFS Emerging Markets Debt R2	MEDEX	Emerging Markets Bond
☐	☐	MFS Emerging Markets Debt R3	MEDFX	Emerging Markets Bond
☐	☐	Lord Abbett Bond Debenture A	LBNDX	High Yield Bond
☐	☐	Lord Abbett Bond Debenture R3	LBNRX	High Yield Bond
☐	☐	JPMorgan High Yield A	OHYAX	High Yield Bond
☐	☐	JPMorgan High Yield R2	JHYZX	High Yield Bond
☐	☐	BlackRock High Yield Bond A	BHYAX	High Yield Bond
☐	☐	Blackrock High Yield Bond R	BHYRX	High Yield Bond
☐	☐	American Century Inflation Adj Bond A	AIAVX	Inflation-Protected Bond
☐	☐	JPMorgan Government Bond A	OGGAX	Intermediate Government
☐	☐	JPMorgan Government Bond R2	JGBZX	Intermediate Government
☐	☐	JPMorgan Core Bond A	PGBOX	Intermediate Government
☐	☐	JPMorgan Core Bond R2	JCBZX	Intermediate Government
☐	☐	Janus Flexible Bond S	JADFX	Intermediate-Term Bond
☐	☐	Janus Flexible Bond R	JDFRX	Intermediate-Term Bond
☐	☐	Lord Abbett Total Return A	LTRAX	Intermediate-Term Bond
☐	☐	Lord Abbett Total Return R3	LTRRX	Intermediate-Term Bond
☐	☐	T.Rowe Price New Income ADV	PANIX	Intermediate - Term Bond
☐	☐	Ivy Limited Term Bond R	IYLTX	Short-Term Bond
☐	☐	Lord Abbett Short Duration Income A	LALDX	Short-Term Bond
☐	☐	Lord Abbett Short Duration Income R3	LDLRX	Short-Term Bond
☐	☐	Columbia Limited Duration Credit A	ALDAX	Short-Term Limited
☐	☐	Legg Mason BW Global Opportunities Bond A	GOBAX	World Bond
☐	☐	Legg Mason BW Global Opportunities Bond R	LBORX	World Bond
D	X	Capital Preservation	Symbol	Category
☐	☐	Lord Abbett USG & GSE Money Market A	LACXX	Government-Taxable
D	X	International/Global Equities	Symbol	Category
☐	☐	Blackrock Emerging Markets Investor A	MDDCX	Diversified Emerging Mkts
☐	☐	Ivy Emerging Markets Equity R	IYPCX	Diversified Emerging Mkts
☐	☐	Federated International Leaders R	FGFRX	Foreign Large Blend
☐	☐	Ivy International Core Equity R	IYITX	Foreign Large Blend
☐	☐	Ivy International Core Equity Y	IVVYX	Foreign Large Blend
☐	☐	Hartford International Growth R3	HNCRX	Foreign Large Growth
☐	☐	Janus International Equity S	JSIEX	Foreign Large Growth
☐	☐	Janus International Equity R	JRIEX	Foreign Large Growth

D	X	International/Global Equities	Symbol	Category
☐	☐	Oppenheimer International Growth R	OIGNX	Foreign Large Growth
☐	☐	John Hancock International Core R1	GOCRX	Foreign Large Value
☐	☐	MFS Global Equity R2	MEQRX	World Stock
☐	☐	MFS Global Equity R3	MWEHX	World Stock
☐	☐	Thornburg Global Opportunities R3	THORX	World Stock
☐	☐	Thornburg Global Opportunities R4	THOVX	World Stock
D	X	Alternatives	Symbol	Category
☐	☐	Blackrock Natural Resources A	MDGRX	Equity Energy
☐	☐	Janus Global Real Estate S	JERSX	Global Real Estate
☐	☐	T. Rowe Price Real Estate Adv	PAREX	Real Estate
D	X	Managed Strategies	Symbol	Category
☐	☐	JHancock Lifestyle Aggressive R1	JPLAX	Aggressive Allocation
☐	☐	JHancock Lifestyle Aggressive R2	JQLAX	Aggressive Allocation
☐	☐	MFS Aggressive Growth Allocation R2	MAWAX	Aggressive Allocation
☐	☐	MFS Aggressive Growth Allocation R3	MAAHX	Aggressive Allocation
☐	☐	JHancock Lifestyle Growth R1	JPLGX	Aggressive Allocation
☐	☐	JHancock Lifestyle Growth R2	JQLGX	Aggressive Allocation
☐	☐	Lord Abbett Multi-Asset Growth A	LWSAX	Aggressive Allocation
☐	☐	Lord Abbett Multi-Asset Growth R3	LGIRX	Aggressive Allocation
☐	☐	MFS Growth Allocation R2	MGALX	Aggressive Allocation
☐	☐	MFS Growth Allocation R3	MAGEX	Aggressive Allocation
☐	☐	American Century Strat Allocation Conservative A	ACCAX	Conservative Allocation
☐	☐	Columbia Income Builder A	RBBAX	Conservative Allocation
☐	☐	Columbia Income Builder R	CBURX	Conservative Allocation
☐	☐	Lord Abbett Multi-Asset Income A	ISFAX	Conservative Allocation
☐	☐	Lord Abbett Multi-Asset Income R3	LIXRX	Conservative Allocation
☐	☐	MFS Diversified Income R3	DIFFX	Conservative Allocation
☐	☐	MFS Diversified Income R2	DIFEX	Conservative Allocation
☐	☐	Columbia Thermostat A	CTFAX	Conservative Allocation
☐	☐	JHancock Lifestyle Conservative R1	JPLCX	Conservative Allocation
☐	☐	JHancock Lifestyle Conservative R2	JQLCX	Conservative Allocation
☐	☐	JHancock Lifestyle Moderate R1	JPLMX	Conservative Allocation
☐	☐	JHancock Lifestyle Moderate R2	JQLMX	Conservative Allocation
☐	☐	MFS Conservative Allocation R2	MCARX	Conservative Allocation
☐	☐	MFS Conservative Allocation R3	MACNX	Conservative Allocation
☐	☐	JHancock Lifestyle Balanced R1	JPLBX	Moderate Allocation
☐	☐	JHancock Lifestyle Balanced R2	JQLBX	Moderate Allocation
☐	☐	MFS Moderate Allocation R2	MARRX	Moderate Allocation
☐	☐	MFS Moderate Allocation R3	MAMHX	Moderate Allocation
☐	☐	Columbia Balanced A	CBLAX	Moderate Allocation

D	X	Managed Strategies	Symbol	Category
☐	☐	Columbia Balanced R	CBLRX	Moderate Allocation
☐	☐	Lord Abbett Multi-Asset Balanced Opportunity A	LABFX	Moderate Allocation
☐	☐	Lord Abbett Multi-Asset Balanced Opportunity R3	BLARX	Moderate Allocation
☐	☐	American Century One Choice In Retirement A	ARTAX	Retirement Income
☐	☐	Manning & Napier Target Income K	MTDKX	Retirement Income
☐	☐	MFS Lifetime Income R2	MLLGX	Retirement Income
☐	☐	MFS Lifetime Income R3	MLLHX	Retirement Income
☐	☐	Templeton Global Balanced A	TAGBX	World Allocation
☐	☐	Benefit FCI Life Strategy Conservative Growth D*		
☐	☐	Benefit FCI Life Strategy Growth D*		
☐	☐	Benefit FCI Life Strategy Moderate Growth D*		
D	X	Target Date	Symbol	Category
☐	☐	MFS Lifetime 2020 R2	MFLGX	Target Date 2016-2020
☐	☐	MFS Lifetime 2025 R2	LTTSX	Target Date 2021-2025
☐	☐	MFS Lifetime 2030 R2	MLTGX	Target Date 2026-2030
☐	☐	MFS Lifetime 2035 R2	LFESX	Target Date 2031-2035
☐	☐	MFS Lifetime 2040 R2	MLFGX	Target Date 2036-2040
☐	☐	MFS Lifetime 2045 R2	LTMSX	Target Date 2041-2045
☐	☐	MFS Lifetime 2050 R2	MFFNX	Target Date 2046-2050
☐	☐	MFS Lifetime 2055 R2	LFISX	Target Date 2051+
☐	☐	MFS Lifetime 2020 R3	MFLHX	Target Date 2016-2020
☐	☐	MFS Lifetime 2025 R3	LTTTX	Target Date 2021-2025
☐	☐	MFS Lifetime 2030 R3	MLTHX	Target Date 2026-2030
☐	☐	MFS Lifetime 2035 R3	LFETX	Target Date 2031-2035
☐	☐	MFS Lifetime 2040 R3	MLFHX	Target Date 2036-2040
☐	☐	MFS Lifetime 2045 R3	LTMTX	Target Date 2041-2045
☐	☐	MFS Lifetime 2050 R3	MFFOX	Target Date 2046-2050
☐	☐	MFS Lifetime 2055 R3	LFITX	Target Date 2051+
☐	☐	American Century One Choice 2020 R	ARBRX	Target Date 2016-2020
☐	☐	American Century One Choice 2025 R	ARWRX	Target Date 2021-2025
☐	☐	American Century One Choice 2030 R	ARCRX	Target Date 2026-2030
☐	☐	American Century One Choice 2035 R	ARYRX	Target Date 2031-2035
☐	☐	American Century One Choice 2040 R	ARDRX	Target Date 2036-2040
☐	☐	American Century One Choice 2045 R	ARORX	Target Date 2041-2045
☐	☐	American Century One Choice 2050 R	ARFWX	Target Date 2046-2050
☐	☐	American Century One Choice 2055 R	AREOX	Target Date 2051+
☐	☐	American Century One Choice 2060 R	ARGRX	Target Date 2051+
☐	☐	American Century One Choice 2020 A	ARBMX	Target Date 2016-2020
☐	☐	American Century One Choice 2025 A	ARWAX	Target Date 2021-2025
☐	☐	American Century One Choice 2030 A	ARCMX	Target Date 2026-2030



D	X	Target Date	Symbol	Category
☐	☐	American Century One Choice 2035 A	ARYAX	Target Date 2031-2035
☐	☐	American Century One Choice 2040 A	ARDMX	Target Date 2036-2040
☐	☐	American Century One Choice 2045 A	AROAX	Target Date 2041-2045
☐	☐	American Century One Choice 2050 A	ARFMX	Target Date 2046-2050
☐	☐	American Century One Choice 2055 A	AREMX	Target Date 2051+
☐	☐	American Century One Choice 2060 A	ARGMX	Target Date 2051+
☐	☐	JHancock Retire Living 2020 R1	JLDDX	Target Date 2016-2020
☐	☐	JHancock Retire Living 2025 R1	JLEDX	Target Date 2021-2025
☐	☐	JHancock Retire Living 2030 R1	JLFDX	Target Date 2026-2030
☐	☐	JHancock Retire Living 2035 R1	JLHDX	Target Date 2031-2035
☐	☐	JHancock Retire Living 2040 R1	JLIDX	Target Date 2036-2040
☐	☐	JHancock Retire Living 2045 R1	JLJDX	Target Date 2041-2045
☐	☐	JHancock Retire Living 2050 R1	JLKDX	Target Date 2046-2050
☐	☐	JHancock Retire Living 2055 R1	JLKMx	Target Date 2051+
☐	☐	JHancock Retire Living 2020 R2	JLDEX	Target Date 2016-2020
☐	☐	JHancock Retire Living 2025 R2	JLEEX	Target Date 2021-2025
☐	☐	JHancock Retire Living 2030 R2	JLFEX	Target Date 2026-2030
☐	☐	JHancock Retire Living 2035 R2	JLHEX	Target Date 2031-2035
☐	☐	JHancock Retire Living 2040 R2	JLIEEX	Target Date 2036-2040
☐	☐	JHancock Retire Living 2045 R2	JLJEX	Target Date 2041-2045
☐	☐	JHancock Retire Living 2050 R2	JLKEX	Target Date 2046-2050
☐	☐	JHancock Retire Living 2055 R2	JLKNX	Target Date 2051+

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