

AGC South West Chapters 401(k) INVESTMENTS



Celebrating the 10 year anniversary of our 401(k) plan offering in 2020!

Cash Equivalent (1 choice)

*Do not want to be invested in either the stock or bond market

- 1) Transamerica Stable Value

One Fund Solutions (14 choices)

* Uncertain about investing on your own
 * Want a disciplined approach
 * Lack the time or interest to focus on it yourself

Balanced Fund (Equity & Income)

- 2) American Funds Balanced Fund

BlackRock Lifepath Target Date

* Choose the fund closest to your retirement date
 * Investment will adjust for risk overtime

- | | | |
|---------------|----------|----------|
| 3) Retirement | 4) 2025 | 5) 2030 |
| 6) 2035 | 7) 2040 | 8) 2045 |
| 9) 2050 | 10) 2055 | 11) 2060 |

Vanguard Life Strategy

*Choose the level of risk you are comfortable with
 * Investment will not adjust for risk overtime

- 12) Income
- 13) Conservative
- 14) Moderate
- 15) Growth

Individual Asset Class (31 choices)

* Comfortable with investing
 * Will monitor your investments on a regular basis
 * Understand risk associated with different investment asset classes
 * Want to compliment a "One Fund Solution" choice you have already made

Broad Equity (Domestic)

- 16) Vanguard Total Stock Market Index

Value (Domestic/Equity)

- 17) American Funds Washington Mutual
- 18) State Street Russell Large-Cap Value Index

Large Cap

Mid Cap

- 19) Victory Sycamore Established Value

Small Cap

- 20) DFA U.S. Targeted Value
- 21) State Street Russell Small-Cap Value Index

Equity (International)

- 33) Oakmark International
- 34) American Funds Euro-Pacific
- 35) Columbia Acorn International
- 36) State Street International Index

Blend (Domestic/Equity)

- 22) DWS Core Equity
- 23) Transamerica Partners Stock Index

- 24) JP Morgan Market Expansion Enhanced Index

- 25) State Street S&P Mid-Cap Index

- 26) Federated MDT Small-Cap Core

- 27) State Street Russell Small-Cap Index

Fixed Income

- 37) Loomis Sayles Investment Grade Bond
- 38) Transamerica Partners High Yield Bond
- 39) Templeton Global Bond
- 40) State Street US Bond Index
- 41) DFA Inflation Protected Securities Portfolio

Growth (Domestic/Equity)

- 28) MFS Massachusetts Investors Growth Stock
- 29) State Street Russell Large-Cap Growth Index

- 30) Pioneer Select Mid-Cap Growth

- 31) Janus Henderson Triton

- 32) State Street Russell Small Cap Growth Index

Specialty/Sector

- 42) Wells Fargo Precious Metals
- 43) Invesco Global Real Estate
- 44) Franklin Utilities
- 45) State Street Emerging Markets Index
- 46) Vanguard Real Estate Index



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Short Bonds/Stable/MMkt

Transamerica Stable Value Core Account	0 %	<input type="text" value="0"/>	%
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Interm./Long-Term Bonds

Loomis Sayles Investment Grade Bond Ret Acct	100 %	<input type="text" value="100"/>	%
SSgA U.S. Bond Index Ret Acct	0 %	<input type="text" value="0"/>	%
Amer Cent Inflation-Adj Bond Ret Acct	0 %	<input type="text" value="0"/>	%

Aggressive Bonds

Transamerica Partners High Yield Bond Ret Acct	0 %	<input type="text" value="0"/>	%
Templeton Global Bond Ret Acct	0 %	<input type="text" value="0"/>	%

Large-Cap Stocks

State Street Russell Lg Cap Value Index Ret Acct	0 %	<input type="text" value="0"/>	%
American Fds Washington Mutual Investors Ret Acct	0 %	<input type="text" value="0"/>	%
DWS Core Equity Ret Acct	0 %	<input type="text" value="0"/>	%
Transamerica Partners Stock Index Ret Acct	0 %	<input type="text" value="0"/>	%
Vanguard Total Stock Market Index Ret Acct	0 %	<input type="text" value="0"/>	%
MFS Massachusetts Inv Gr Stk	0 %	<input type="text" value="0"/>	%
State Street Russell Lg Cap Grow Idx Ret Acct	0 %	<input type="text" value="0"/>	%

Small/Mid-Cap Stocks

Victory Established Value Ret Acct	0 %	<input type="text" value="0"/>	%
JPMorgan Market Expansion Index Ret Acct	0 %	<input type="text" value="0"/>	%
State Street S&P Mid Cap Indx Ret Acct	0 %	<input type="text" value="0"/>	%
Pioneer Select Mid Cap Growth Ret Acct	0 %	<input type="text" value="0"/>	%
DFA U.S. Targeted Value Portfolio Ret Acct	0 %	<input type="text" value="0"/>	%
State Street Russell Sm Cap Val Index Ret Acct	0 %	<input type="text" value="0"/>	%
Federated MDT Small Cap Core Ret Acct	0 %	<input type="text" value="0"/>	%
State Street Russell Small Cap Index Ret Acct	0 %	<input type="text" value="0"/>	%
Janus Triton Ret Acct	0 %	<input type="text" value="0"/>	%
State Street Russell Sm Cap Grow Idx Ret Acct	0 %	<input type="text" value="0"/>	%
Invesco Global Real Estate Ret Acct	0 %	<input type="text" value="0"/>	%
TA Vanguard Real Estate Index Ret Acct	0 %	<input type="text" value="0"/>	%

International Stocks

Amer Funds EuroPacific Growth Ret Acct	0 %	<input type="text" value="0"/>	%
Oakmark International Ret Acct	0 %	<input type="text" value="0"/>	%
State Street Intl Index Ret Acct	0 %	<input type="text" value="0"/>	%
Columbia Acorn International Ret Acct	0 %	<input type="text" value="0"/>	%
SSgA Emerging Markets Index Ret Acct	0 %	<input type="text" value="0"/>	%

Multi-Asset/Other

American Funds Balanced Ret Acct	0 %	<input type="text" value="0"/>	%
Franklin Utilities Ret Acct	0 %	<input type="text" value="0"/>	%
Wells Fargo Precious Metals Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index Retirement Ret Acct	0 %	<input type="text" value="0"/>	%
Vanguard LifeStrategy Income Ret Acct	0 %	<input type="text" value="0"/>	%
TA Vanguard LifeStrat Conserv Gr Ret Acct	0 %	<input type="text" value="0"/>	%
Vanguard LifeStrategy Moderate Growth Ret Acct	0 %	<input type="text" value="0"/>	%
Vanguard LifeStrategy Growth Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2025 Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2030 Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2035 Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2040 Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2045 Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2050 Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2055 Ret Acct	0 %	<input type="text" value="0"/>	%
TA BlackRock Lifepath Index 2060 Ret Acct	0 %	<input type="text" value="0"/>	%

