

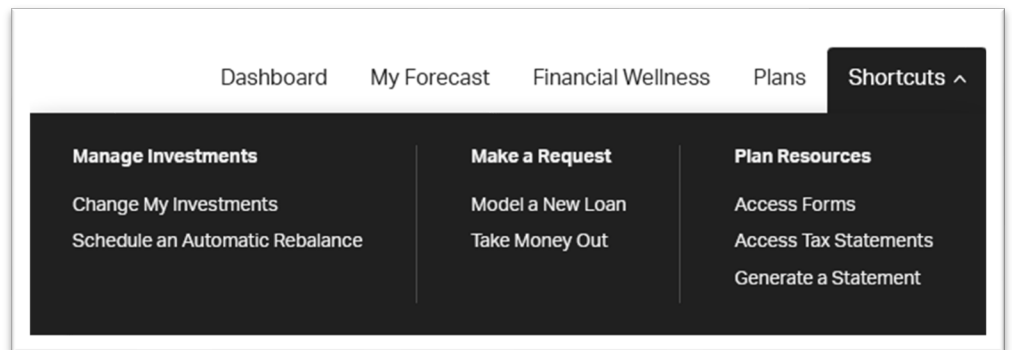
# Schedule Automatic Rebalancing

**Automated Account Rebalancing redistributes your account balances according to your investment elections at the time of rebalancing, and on a frequency of your choice.**

## STEP 1

### From the Dashboard:

- Select the *Shortcuts* menu
- Choose *Schedule an Automatic Rebalance*
- Agree to the Terms and Conditions



## STEP 2

### Choose Your Frequency:

- Quarterly
- Semi-Annually
- Annually

A screenshot of a form titled 'Frequency for Automated Account Rebalance'. Below the title, there is a text box that says: 'Select the frequency for how often you would like your account to be automatically rebalanced. (This frequency will not affect your future contributions.)'. Below this text box is a section titled 'SELECT A FREQUENCY PERIOD' containing three radio button options: 'Quarterly', 'Semi-Annually', and 'Annually'.

## STEP 3

### Expected Rebalance Date:

- Confirm your Expected Rebalance Date
- Agree to the Terms and Conditions
- Select Submit

A screenshot of a confirmation box. It contains the text: 'Your next expected rebalance date is April 23, 2025.' In the bottom right corner of the box is a dark grey button with the text 'OK' in white.