



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



D	X	Fixed Income	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	Eaton Vance Floating Rate A	EVBLX	Bank Loan
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett Income R3	LaurRX	Corporate Bond
<input type="checkbox"/>	<input type="checkbox"/>	MFS Corporate Bond R3	MFBHX	Corporate Bond
<input type="checkbox"/>	<input type="checkbox"/>	MFS Corporate Bond R2	MBRRX	Corporate Bond
<input type="checkbox"/>	<input type="checkbox"/>	MFS Emerging Markets Debt R2	MEDEX	Emerging Markets Bond
<input type="checkbox"/>	<input type="checkbox"/>	MFS Emerging Markets Debt R3	MEDFX	Emerging Markets Bond
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett Bond Debenture R3	LBNRX	High Yield Bond
<input type="checkbox"/>	<input type="checkbox"/>	JPMorgan High Yield A	OHYAX	High Yield Bond
<input type="checkbox"/>	<input type="checkbox"/>	JPMorgan High Yield R2	JHYZX	High Yield Bond
<input type="checkbox"/>	<input type="checkbox"/>	BlackRock High Yield Bond A	BHYAX	High Yield Bond
<input type="checkbox"/>	<input type="checkbox"/>	Blackrock High Yield Bond R	BHYRX	High Yield Bond
<input type="checkbox"/>	<input type="checkbox"/>	American Century Inflation Adj Bond A	AIAVX	Inflation-Protected Bond
<input type="checkbox"/>	<input type="checkbox"/>	JPMorgan Government Bond A	OGGAX	Intermediate Government
<input type="checkbox"/>	<input type="checkbox"/>	JPMorgan Government Bond R2	JGBZX	Intermediate Government
<input type="checkbox"/>	<input type="checkbox"/>	JPMorgan Core Bond A	PGBOX	Intermediate Government
<input type="checkbox"/>	<input type="checkbox"/>	JPMorgan Core Bond R2	JCBZX	Intermediate Government
<input type="checkbox"/>	<input type="checkbox"/>	Janus Flexible Bond S	JADFX	Intermediate-Term Bond
<input type="checkbox"/>	<input type="checkbox"/>	Janus Flexible Bond R	JDFRX	Intermediate-Term Bond
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett Total Return R3	LTRRX	Intermediate-Term Bond
<input type="checkbox"/>	<input type="checkbox"/>	T.Rowe Price New Income ADV	PANIX	Intermediate - Term Bond
<input type="checkbox"/>	<input type="checkbox"/>	Ivy Limited Term Bond R	IYLTX	Short-Term Bond
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett Short Duration Income R3	LDLRX	Short-Term Bond
<input type="checkbox"/>	<input type="checkbox"/>	Columbia Limited Duration Credit A	ALDAX	Short-Term Limited
<input type="checkbox"/>	<input type="checkbox"/>	Legg Mason BW Global Opportunities Bond A	GOBAX	World Bond
<input type="checkbox"/>	<input type="checkbox"/>	Legg Mason BW Global Opportunities Bond R	LBORX	World Bond
D	X	Capital Preservation	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett USG & GSE Money Market A	LACXX	Government-Taxable
D	X	International/Global Equities	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	Blackrock Emerging Markets Investor A	MDDCX	Diversified Emerging Mkts
<input type="checkbox"/>	<input type="checkbox"/>	Ivy Emerging Markets Equity R	IYPCX	Diversified Emerging Mkts
<input type="checkbox"/>	<input type="checkbox"/>	Federated International Leaders R	FGFRX	Foreign Large Blend
<input type="checkbox"/>	<input type="checkbox"/>	Ivy International Core Equity R	IYITX	Foreign Large Blend
<input type="checkbox"/>	<input type="checkbox"/>	Ivy International Core Equity Y	IVVYX	Foreign Large Blend
<input type="checkbox"/>	<input type="checkbox"/>	Hartford International Growth R3	HNCRX	Foreign Large Growth
<input type="checkbox"/>	<input type="checkbox"/>	Janus International Equity S	JSIEX	Foreign Large Growth
<input type="checkbox"/>	<input type="checkbox"/>	Janus International Equity R	JRIEX	Foreign Large Growth
<input type="checkbox"/>	<input type="checkbox"/>	Oppenheimer International Growth R	OIGNX	Foreign Large Growth
<input type="checkbox"/>	<input type="checkbox"/>	John Hancock International Core R1	GOCRX	Foreign Large Value
<input type="checkbox"/>	<input type="checkbox"/>	MFS Global Equity R2	MEQRX	World Stock
<input type="checkbox"/>	<input type="checkbox"/>	MFS Global Equity R3	MWEHX	World Stock



D	X	International/Global Equities	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	Thornburg Global Opportunities R3	THORX	World Stock
<input type="checkbox"/>	<input type="checkbox"/>	Thornburg Global Opportunities R4	THOVX	World Stock
D	X	Alternatives	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	Blackrock Natural Resources A	MDGRX	Equity Energy
<input type="checkbox"/>	<input type="checkbox"/>	Janus Global Real Estate S	JERSX	Global Real Estate
<input type="checkbox"/>	<input type="checkbox"/>	T. Rowe Price Real Estate Adv	PAREX	Real Estate
D	X	Managed Strategies	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Aggressive R1	JPLAX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Aggressive R2	JQLAX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Aggressive Growth Allocation R2	MAWAX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Aggressive Growth Allocation R3	MAAHX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Growth R1	JPLGX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Growth R2	JQLGX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett Multi-Asset Growth R3	LGIRX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Growth Allocation R2	MGALX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Growth Allocation R3	MAGEX	Aggressive Allocation
<input type="checkbox"/>	<input type="checkbox"/>	American Century Strat Allocation Conservative A	ACCAX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Columbia Income Builder A	RBBAX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Columbia Income Builder R	CBURX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett Multi-Asset Income R3	LIXRX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Diversified Income R3	DIFFX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Diversified Income R2	DIFEX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Columbia Thermostat A	CTFAX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Conservative R1	JPLCX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Conservative R2	JQLCX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Moderate R1	JPLMX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Moderate R2	JQLMX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Conservative Allocation R2	MCARX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Conservative Allocation R3	MACNX	Conservative Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Balanced R1	JPLBX	Moderate Allocation
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Lifestyle Balanced R2	JQLBX	Moderate Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Moderate Allocation R2	MARRX	Moderate Allocation
<input type="checkbox"/>	<input type="checkbox"/>	MFS Moderate Allocation R3	MAMHX	Moderate Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Columbia Balanced A	CBLAX	Moderate Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Columbia Balanced R	CBLRX	Moderate Allocation
<input type="checkbox"/>	<input type="checkbox"/>	Lord Abbett Multi-Asset Balanced Opportunity R3	BLARX	Moderate Allocation
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice In Retirement A	ARTAX	Retirement Income
<input type="checkbox"/>	<input type="checkbox"/>	Manning & Napier Target Income K	MTDKX	Retirement Income
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime Income R2	MLLGX	Retirement Income
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime Income R3	MLLHX	Retirement Income



D	X	Managed Strategies	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	Templeton Global Balanced A	TAGBX	World Allocation
D	X	Target Date	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2020 R2	MFLGX	Target Date 2016-2020
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2025 R2	LTTSX	Target Date 2021-2025
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2030 R2	MLTGX	Target Date 2026-2030
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2035 R2	LFESX	Target Date 2031-2035
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2040 R2	MLFGX	Target Date 2036-2040
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2045 R2	LTMSX	Target Date 2041-2045
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2050 R2	MFFNX	Target Date 2046-2050
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2055 R2	LFISX	Target Date 2051+
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2020 R3	MFLHX	Target Date 2016-2020
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2025 R3	LTTTX	Target Date 2021-2025
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2030 R3	MLTHX	Target Date 2026-2030
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2035 R3	LFETX	Target Date 2031-2035
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2040 R3	MLFHX	Target Date 2036-2040
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2045 R3	LTMTX	Target Date 2041-2045
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2050 R3	MFFOX	Target Date 2046-2050
<input type="checkbox"/>	<input type="checkbox"/>	MFS Lifetime 2055 R3	LFITX	Target Date 2051+
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2020 R	ARBRX	Target Date 2016-2020
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2025 R	ARWRX	Target Date 2021-2025
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2030 R	ARCRX	Target Date 2026-2030
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2035 R	ARYRX	Target Date 2031-2035
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2040 R	ARDRX	Target Date 2036-2040
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2045 R	ARORX	Target Date 2041-2045
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2050 R	ARFWX	Target Date 2046-2050
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2055 R	AREOX	Target Date 2051+
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2060 R	ARGRX	Target Date 2051+
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2020 A	ARBMX	Target Date 2016-2020
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2025 A	ARWAX	Target Date 2021-2025
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2030 A	ARCMX	Target Date 2026-2030
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2035 A	ARYAX	Target Date 2031-2035
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2040 A	ARDMX	Target Date 2036-2040
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2045 A	AROAX	Target Date 2041-2045
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2050 A	ARFMX	Target Date 2046-2050
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2055 A	AREMX	Target Date 2051+
<input type="checkbox"/>	<input type="checkbox"/>	American Century One Choice 2060 A	ARGMX	Target Date 2051+
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2020 R1	JLDDX	Target Date 2016-2020
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2025 R1	JLEDX	Target Date 2021-2025
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2030 R1	JLFDX	Target Date 2026-2030
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2035 R1	JLHDX	Target Date 2031-2035



D	X	Target Date	Symbol	Category
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2040 R1	JLIDX	Target Date 2036-2040
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2045 R1	JLJDX	Target Date 2041-2045
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2050 R1	JLKDX	Target Date 2046-2050
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2055 R1	JLKMX	Target Date 2051+
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2020 R2	JLDEX	Target Date 2016-2020
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2025 R2	JLEEX	Target Date 2021-2025
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2030 R2	JLFEX	Target Date 2026-2030
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2035 R2	JLHEX	Target Date 2031-2035
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2040 R2	JLIEX	Target Date 2036-2040
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2045 R2	JLJEX	Target Date 2041-2045
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2050 R2	JLKEX	Target Date 2046-2050
<input type="checkbox"/>	<input type="checkbox"/>	JHancock Retire Living 2055 R2	JLKNX	Target Date 2051+

There are a vast universe of mutual funds which are suitable for investment in a 401(k) plan. DST Systems, Inc. does not recommend or endorse the use of any of the mutual funds listed.

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