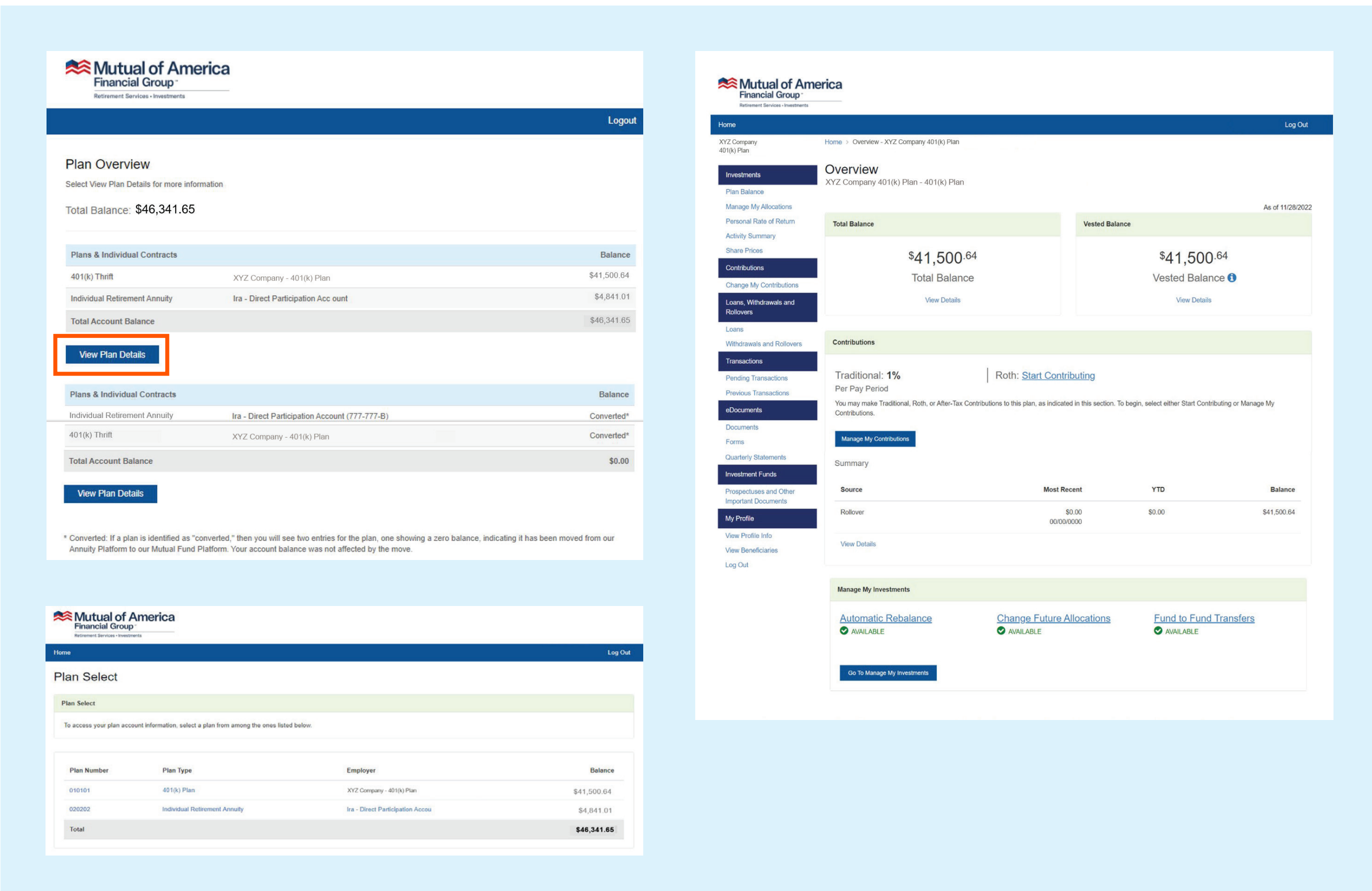
Mutual of America
Financial Group
Retirement Services • Investments

My Account User Guide
Changing Future Allocations

After you log in, you will see one of these two pages:

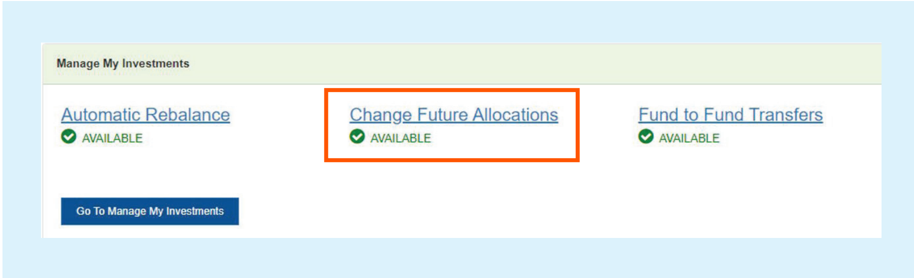
If you have more than one plan, you will see the Plan Overview page, as shown in the screen capture below. Click **View Plan Details**, then select your 401(k) Plan.

If you have only one plan, you can access the “Manage My Plan” features, including Change My Future Allocations, from here.



Information continued on following pages.

From the Plan Overview page, scroll to the bottom. Click **Change Future Allocations**.

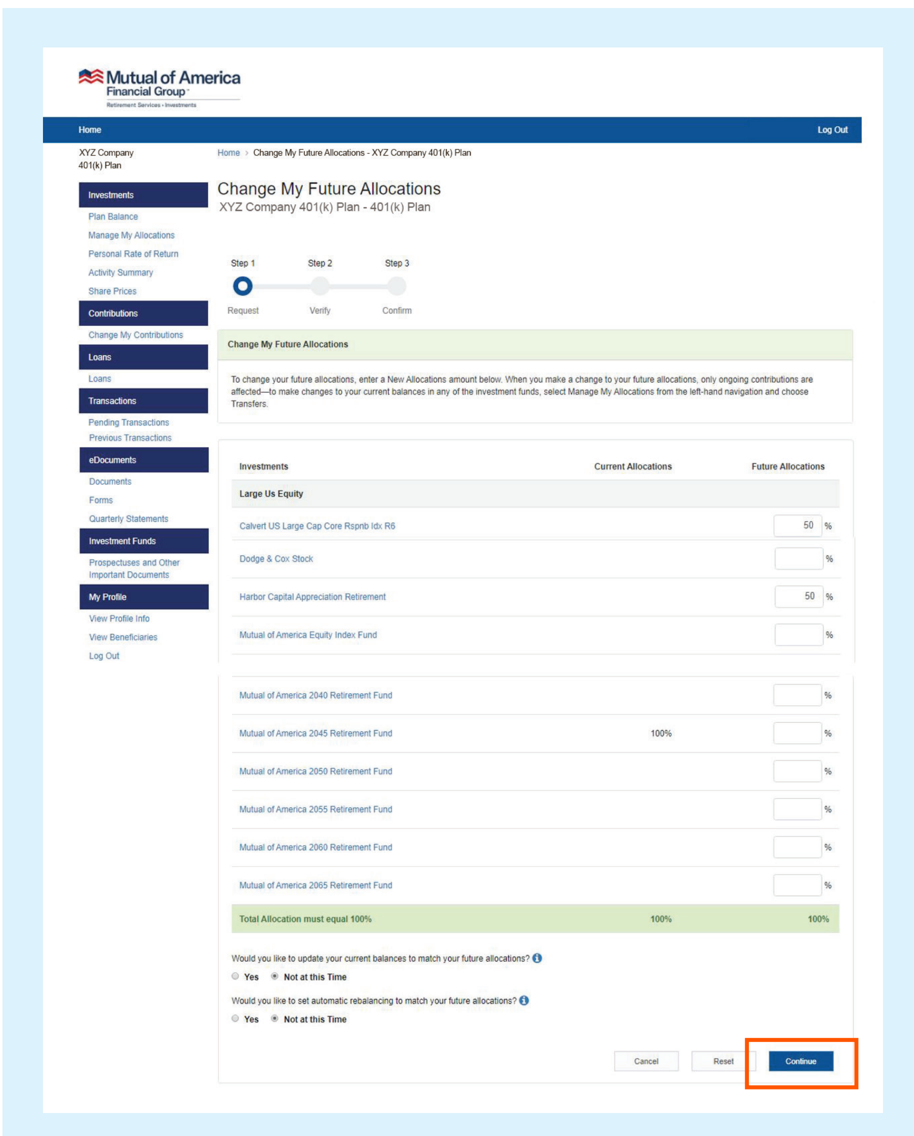


Changing Future Allocations – Request

On this page, you'll find your list of investment options, a column that shows your Current Allocations and a column for you to choose the investment options that should be included in Future Allocations.

Note: The **Continue** button **will not be enabled until total Future Contribution percentages equal 100%**. Once the total equals 100%, two questions regarding Automatic Contribution options will appear near the bottom of the page. If the Invesco Stable Value Fund is among your allocations, these two options will not appear due to the fund's equity wash rules. Please see the prospectus for more information.

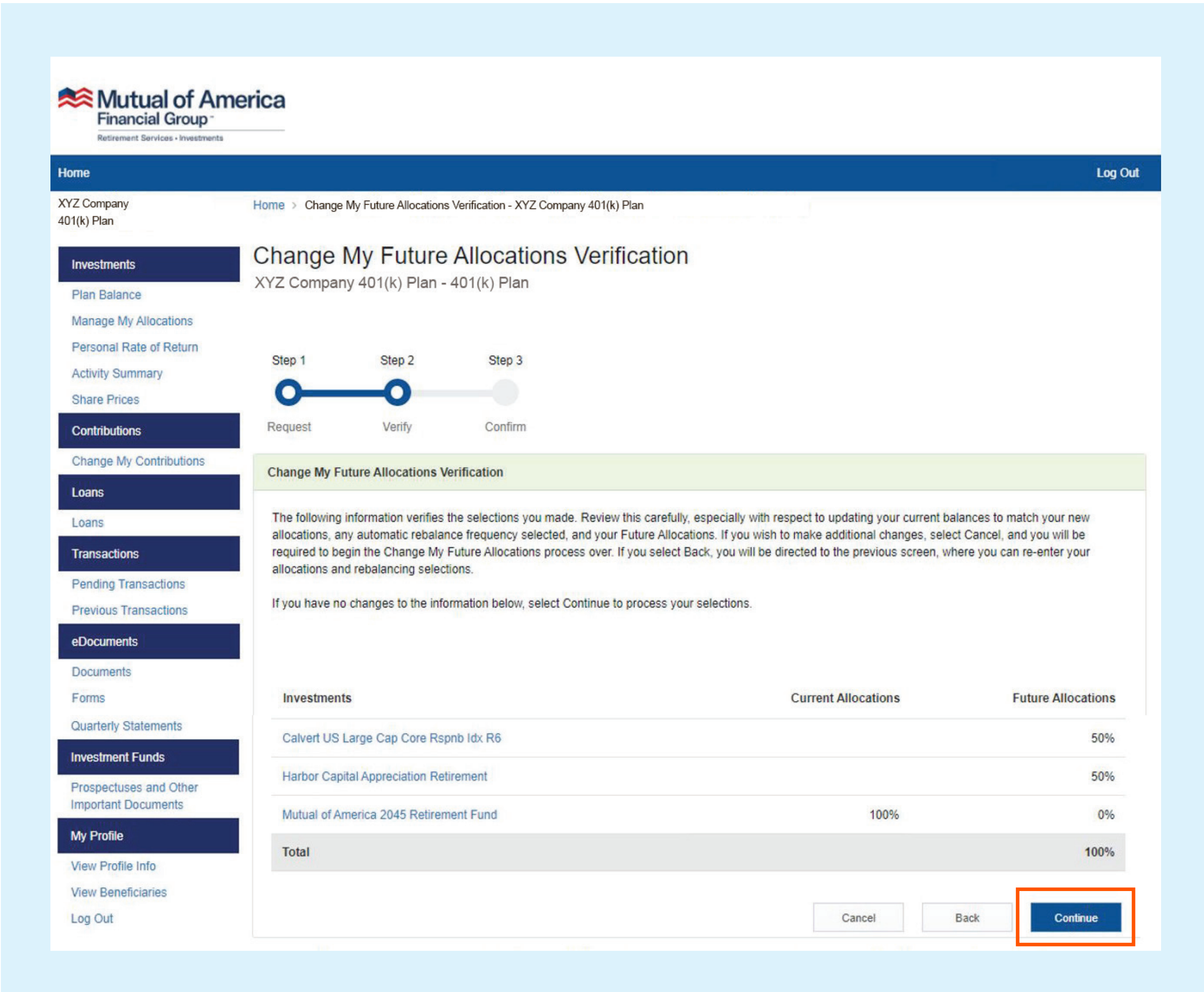
In the image below, not all investment options are shown, and the Future Allocations shown are for illustrative purposes only.



Changing Future Allocations – Verify

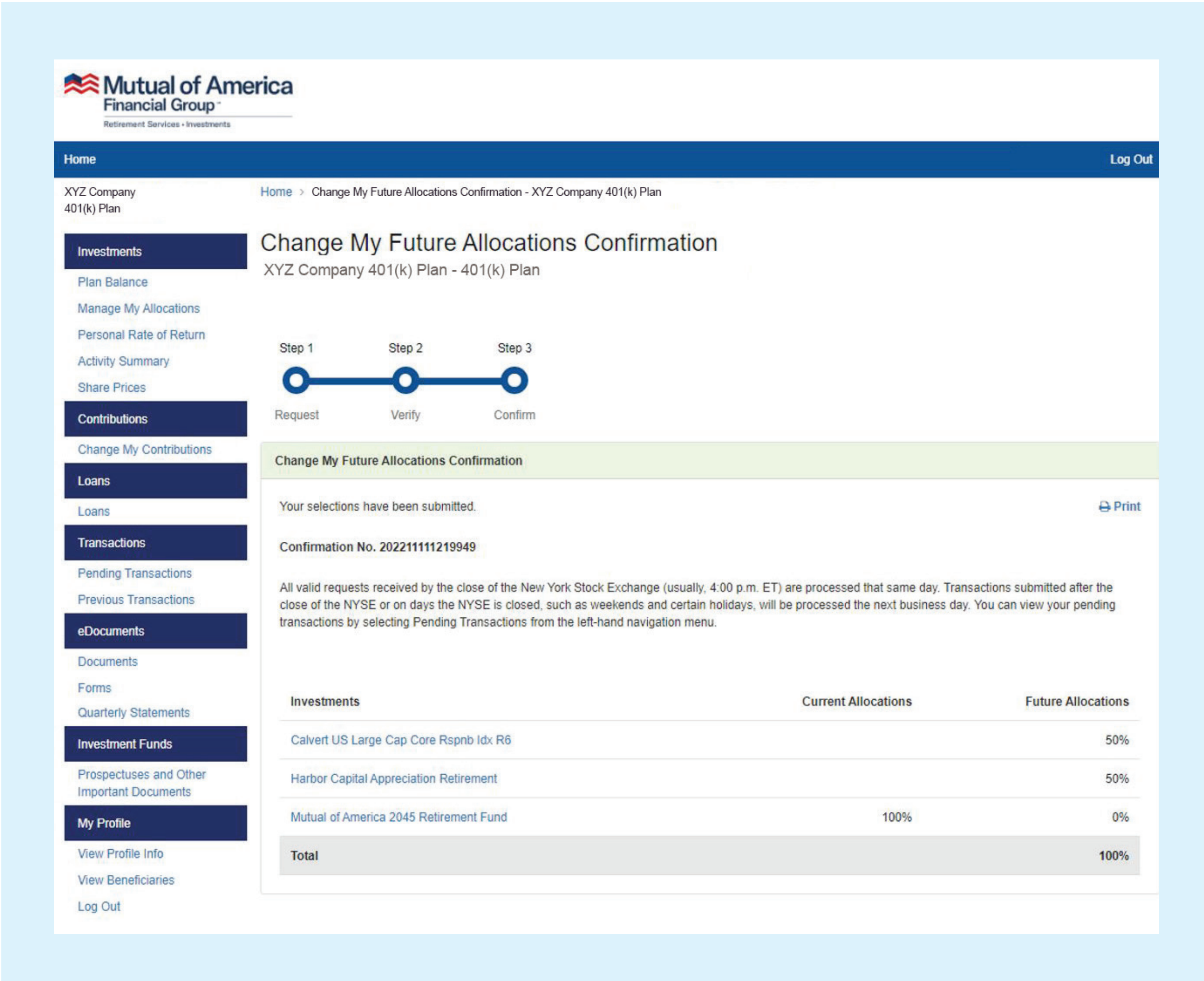
In the Verify step, you will see your Current Allocations and your recently selected Future Allocations. At this point, you can return to the previous page to change your selections, or you can click the **Continue** button to confirm your choices.

The investment selections shown in the image below are only for illustrative purposes.



In the Confirm step, you will see the same information that was displayed on the previous page. However, since your future allocation preferences have been acknowledged, the page also contains a confirmation number for future reference.

Note that the investment selections shown in the image below are only for illustrative purposes.

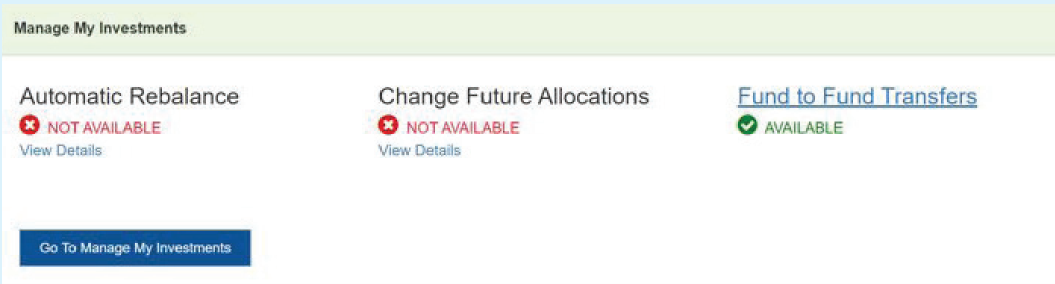


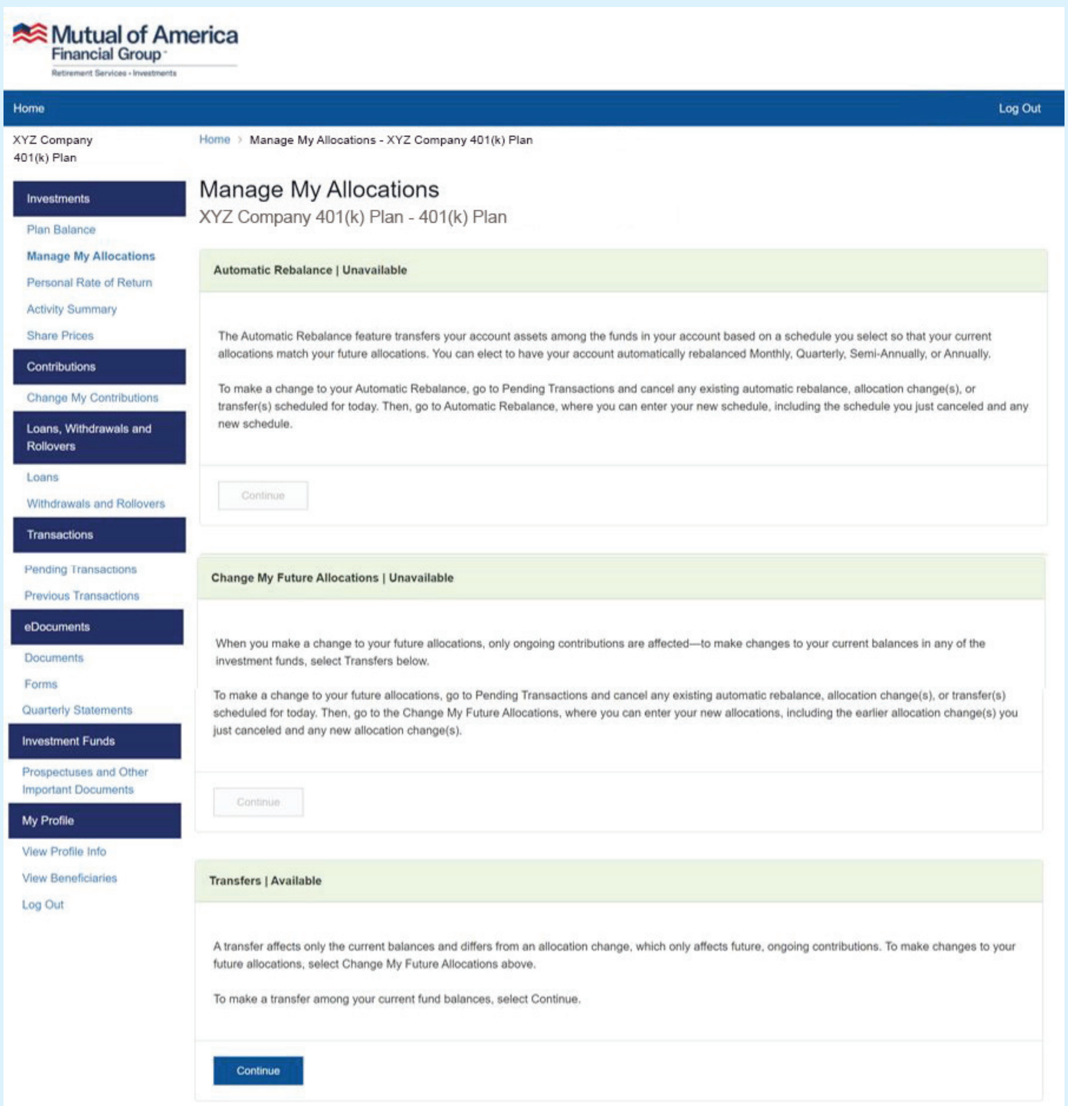
Immediately After Changing the Future Allocations

You will be prevented from making another Rebalance Request or a change of Future Allocations until the first one has been acknowledged by the system.

If the request is made before 4:00 p.m. ET, it should be processed by the start of the next business day.

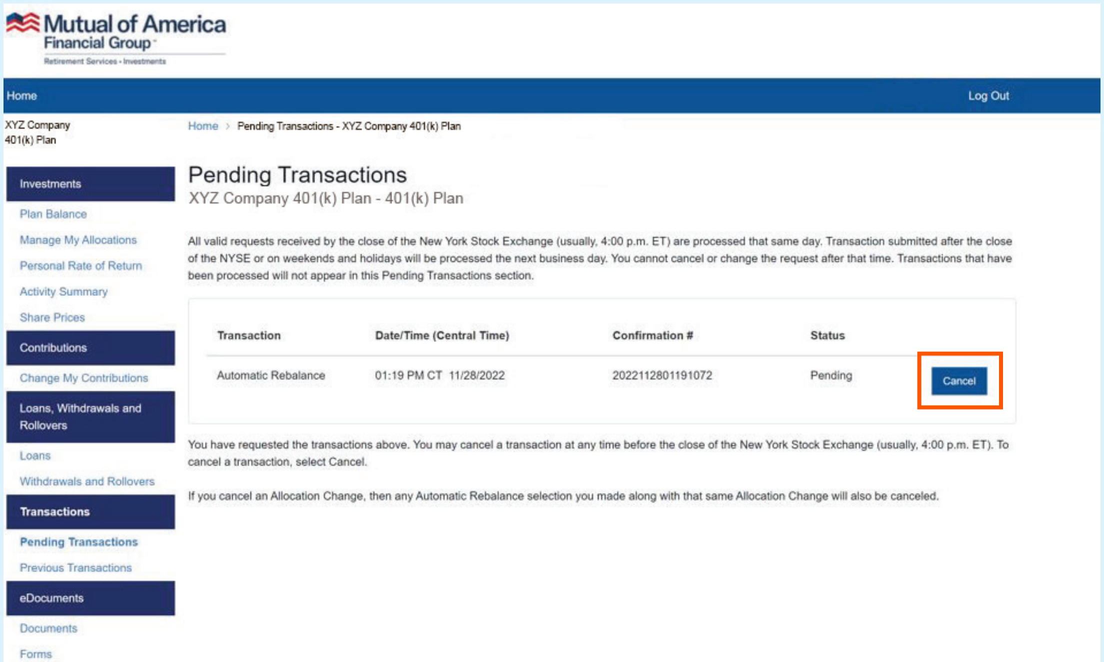
If the request is made after 4:00 p.m. ET, it should be processed by the start of the day after the next business day.

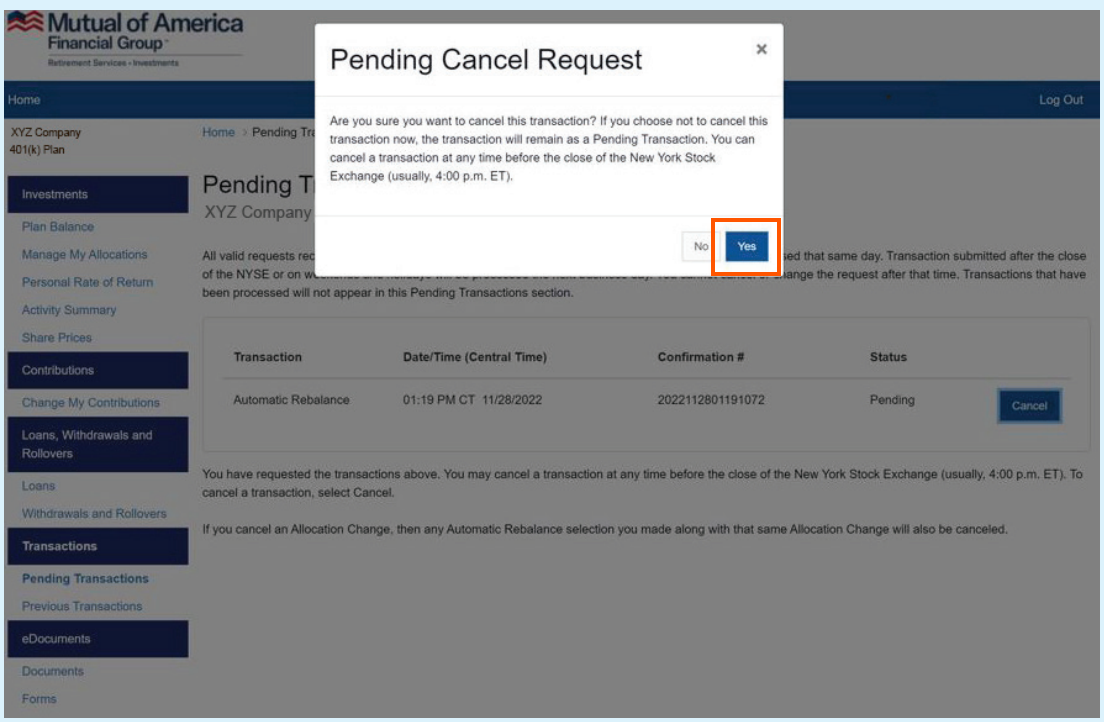




Canceling the Change of Future Allocations

If your request has not yet been processed, you can cancel the request by clicking the **Pending Transactions** link on the left side of the page. Clicking on the **Cancel** button will bring up a prompt that will ask you to confirm your cancellation. Clicking the **Yes** button in that prompt will remove the request from the transaction list.





Canceling the Change of Future Allocations (continued)