



**MACHINISTS
RETIREMENT
AND SAVINGS PLAN**

Machinists Retirement and Savings Plan

FORMS



SEND COMPLETED FORM TO: Email: benefits@firsthilltrust.com | **First Hill Trust Company**
 PO Box 550, Seattle, WA 98111-0550

IMPORTANT NOTICE REGARDING DESIGNATION OF BENEFICIARY

To the Employee: Federal law requires that if you are married, benefits payable under the Plan by reason of your death must be paid to your surviving spouse. However, you have the right to designate a beneficiary other than your spouse, provided your spouse consents, in writing, to the designation. If you are single, you may choose anyone as your primary beneficiary. If you get married this form will be revoked and your surviving spouse becomes your primary beneficiary unless a new form is submitted.

To Employee's Spouse: If your spouse designates someone other than you as primary beneficiary, the designation will only be effective if you agree to the designation. Please contact the Administration Office for the Spousal Consent and Notary form.

Employee _____

Last First Middle Date of Birth
 SSN _____ Marital Status _____ Cell Phone _____ Email _____
 Address _____

Street City State Zip

I hereby designate the following individual or individuals as my beneficiary or beneficiaries under the Machinists Retirement and Savings Plan, and I hereby revoke any beneficiary designations previously made by me.

Primary Beneficiary _____

Last First Middle % or amount of benefit
 Address _____

Street City State Zip
 SSN _____ Birth Date _____ Cell Phone _____ Relationship to Employee _____

Contingent Beneficiary _____

Last First Middle % or amount of benefit
 Address _____

Street City State Zip
 SSN _____ Birth Date _____ Cell Phone _____ Relationship to Employee _____

Contingent Beneficiary _____

Last First Middle % or amount of benefit
 Address _____

Street City State Zip
 SSN _____ Birth Date _____ Cell Phone _____ Relationship to Employee _____

➤ **Signature of Employee** _____ **Date** _____

If your spouse is not the primary beneficiary, please contact the Administration Office for the Spousal Consent and Notary Form.



SEND COMPLETED FORM TO:

Email: benefits@firsthilltrust.com

First Hill Trust Company

PO Box 550, Seattle, WA 98111-0550

Name _____

SSN _____ Last _____ Date of birth _____ First _____ Middle _____

Address _____ Street _____ City _____ State _____ Zip _____

Required for online registration: Email _____ Cell phone _____

A: I hereby authorize investment of my contributions in the following manner:

Selections made in this part of the form will ONLY affect future contributions.

- 1. Cohen & Steers Instl Realty Shares CSRIX
2. American Funds EuroPacific Growth R6 RERGX
3. Manning & Napier Rainier Int'l Discy I RAIIX
4. Fidelity International Index FSPSX
5. Vanguard Small Cap Index Institutional VSCIX
6. Blackrock Mid-Cap Growth Equity K BMGKX
7. Victory Sycamore Established Value R6 VEVRX
8. Vanguard Growth Index I VIGAX
9. Vanguard Equity Income Admiral VEIRX
10. Schwab S&P 500 Index Admiral SWPPX
11. Vanguard Target Retirement 2070 Fund VSVNX
12. Vanguard Target Retirement 2065 Fund VLXVX
13. Vanguard Target Retirement 2060 Fund VTTSX
14. Vanguard Target Retirement 2055 Fund VFFVX
15. Vanguard Target Retirement 2050 Fund VFIFX
16. Vanguard Target Retirement 2045 Fund VTIVX
17. Vanguard Target Retirement 2040 Fund VFORX
18. Vanguard Target Retirement 2035 Fund VTTHX
19. Vanguard Target Retirement 2030 Fund VTHRX
20. Vanguard Target Retirement 2025 Fund VTTVX
21. Vanguard Target Retirement 2020 Fund VTWNX
22. Vanguard Target Retirement Income VTINX
23. American Funds Balanced R6 RLBGX
24. PGIM High Yield R6 PHYQX
25. Dodge & Cox Income DOXIX
26. Loomis Sayles Investment Grade Bond N LGBNX
27. LordAbbett Short Duration Income R6 LDLVX
28. Morley Stable Value CI 25-I SIBTZ
100 % TOTAL (Percentage must total 100)

Elections should be in whole percentages. If you do not direct the investment of your contributions, or if your selection of investments does not total 100%, your contributions will be invested in the Vanguard Target Retirement Fund appropriate for your date of birth.

I hereby authorize my existing account to be REBALANCED according to the above percentages.

B: I hereby authorize the following exchanges of my existing account balance:

Selections made in this part of the form will ONLY affect existing balances.

EXCHANGE FROM:

Fund Name _____

Check one Dollar Amount \$ _____

Fund Name _____

Check one Dollar Amount \$ _____

EXCHANGE TO:

Fund Name _____

Percentage _____ %

Fund Name _____

Percentage _____ %

To change your asset allocation or transfer your balances, please visit: www.firsthilltrust.com.

To obtain additional investment information, contact Scott Capital Advisors, LLC at (503) 487-0860 or email info@scottcapitaladvisors.com.

I understand that the exchanges between mutual funds will be made in accordance with the provisions of the current prospectuses for the funds involved. I also understand that the administration offices of the Machinists Retirement and Savings Plan will initiate the exchange(s) requested on this form as soon as practicable following the day received, provided this form is properly completed and all exchanges requested are permitted under the terms of the Plan and the applicable prospectuses. I understand the value of my mutual fund investment will fluctuate over time and the risks associated with investing in the above funds as described in the fund prospectuses.

Signature _____ Date _____

Qualified Default Investment Alternative Notice

This is an annual notice and applies to the 2024 Plan Year.

Right to Direct Investment. As a participant in the Machinists Retirement and Savings Plan, you have the right to direct the investment of your account balances into any of the investment options offered in the plan. We encourage all participants to make an investment election to ensure that amounts in the plan are invested in accordance with your savings goals and risk tolerance. Investment elections may be made via the plan's website (www.firsthilltrust.com) or by calling an First Hill Trust Company Customer Service Representative at (800) 524-4852 to request a form.

Default Investment Option. If you do not make an election as to how the plan should invest your accounts, then the plan will invest your account into the default investment that the plan trustees have selected. The default investment for the plan is one of the Target Date Funds listed below. The Target Date Fund in which your contributions would be invested is based upon your birth date.

Please note: If you have previously made an investment election, your contributions will continue to be invested in the funds that you have chosen.

Default Investment Option: Vanguard Target Retirement Funds					
Default Description	The Target Date Fund is based upon your birth date. Birth years and corresponding funds are listed below:				
		Birth Year		Target Date Fund	
		1952 or Earlier		Vanguard Target Retirement Income	
		1953 - 1957		Vanguard Target Retirement 2020	
		1958 - 1962		Vanguard Target Retirement 2025	
		1963 - 1967		Vanguard Target Retirement 2030	
		1968 - 1972		Vanguard Target Retirement 2035	
		1973 - 1977		Vanguard Target Retirement 2040	
		1978 - 1982		Vanguard Target Retirement 2045	
		1983 - 1987		Vanguard Target Retirement 2050	
		1988 - 1992		Vanguard Target Retirement 2055	
		1993 - 1997		Vanguard Target Retirement 2060	
		1998 - 2002		Vanguard Target Retirement 2065	
		2003 or Later		Vanguard Target Retirement 2070	
Investment Objectives and Risk/Return Characteristics	<p>The investment objective of the Vanguard Target Retirement Funds is to provide capital appreciation and current income consistent with its current asset allocation appropriate for the target year. The Target Date funds invest in Vanguard mutual funds using an asset allocation strategy designed for investors planning to retire and leave the workforce in or within a few years of the target year. The funds' asset allocation will become more conservative over time.</p> <p>Risk & Return Characteristics of Vanguard Target Retirement Funds:</p> <ul style="list-style-type: none"> • Market Risk – the Funds are subject to the market fluctuations of their underlying investments. • Allocation Risk – the Funds are subject to the risk that the selection of underlying funds and the allocation of fund assets will cause the funds to underperform other funds with a similar investment objective. 				
Target Retirement	Annual Operating Expenses		Target Retirement	Annual Operating Expenses	
Fund	Avg. Exp. Ratio	Per \$1,000	Fund	Avg. Exp. Ratio	Per \$1,000
Target Ret Income	0.08%	\$0.80	Target Ret 2020	0.08%	\$0.80
Target Ret 2025	0.08%	\$0.80	Target Ret 2030	0.08%	\$0.80
Target Ret 2035	0.08%	\$0.80	Target Ret 2040	0.08%	\$0.80
Target Ret 2045	0.08%	\$0.80	Target Ret 2050	0.08%	\$0.80
Target Ret 2055	0.08%	\$0.80	Target Ret 2060	0.08%	\$0.80
Target Ret 2065	0.08%	\$0.80	Target Ret 2070	0.08%	\$0.80

Right to Alternative Investment. You have the continuing right to revise the investment of your account at any time by accessing the website www.firsthilltrust.com or by calling an First Hill Trust Company Customer Service Representative at (800) 524-4852 to request a form. If you transfer your money out of the default investment, neither the plan nor the investment vendor will impose any transfer fees.

Where to Go for Further Investment Information. You can obtain additional investment information about the plan's investment options by logging onto the plan website at www.firsthilltrust.com or by contacting Scott Capital Advisors, LLC at (503) 487-0860 (please identify yourself as a Machinists Retirement and Savings Plan participant).



**MACHINISTS
RETIREMENT
AND SAVINGS PLAN**

Ready to Streamline Your Retirement Planning?

Roll Over Your Retirement Plan into the Machinists Retirement and Savings Plan!

Are you juggling multiple retirement accounts? Simplify your life and secure your future with the Machinists Retirement and Savings Plan.

Benefits Include:



Simplified Management



Potential Cost Savings



Consolidated Approach to Retirement Planning

Take Action Today!



Call us at 1-800-524-4852



Email us at benefits@firsthilltrust.com

Don't miss out on the opportunity to make your retirement planning easier and more efficient. Contact us now.



Plan to Plan Transfer Request

SEND COMPLETED FORM TO: Email: benefits@firsthilltrust.com First Hill Trust Company PO Box 550, Seattle, WA 98111-0550

From _____ Date of birth _____
SSN _____ Cell phone _____
Current Employer _____ Email _____

As a former Participant in a tax qualified corporate retirement program sponsored by (past Employer) _____, please be advised that I wish to roll my distribution from the plan into the Machinists Retirement and Savings Plan.

Enclosed is a check for \$ _____ from the prior plan's trustee made payable to "Machinists Retirement and Savings Plan FBO (print your name) _____." This represents my distribution from the prior plan a qualified corporate retirement plan.

Contact name of past Employer's Plan _____ Phone _____

I understand that these funds, once deposited in the plan, will be subject to all provisions of the plan. Further, I acknowledge that these funds will not be subject to withdrawal from the plan until separation of service, retirement or death.

Invest my Rollover per my current investment elections.

Investment Selection

- 1. Cohen & Steers Instl Realty Shares CSRIX
2. American Funds EuroPacific Growth R6 RERGX
3. Manning & Napier Rainier Int'l Discy I RAIIX
4. Fidelity International Index FSPSX
5. Vanguard Small Cap Index Institutional VSCIX
6. Blackrock Mid-Cap Growth Equity K BMGKX
7. Victory Sycamore Established Value R6 VEVRX
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26. Loomis Sayles Investment Grade Bond N LGBNX
27. LordAbbett Short Duration Income R6 LDLVX
28. Morley Stable Value CI 25-I SIBTZ
100 % TOTAL (Percentage must total 100)

If you do not direct the investment of your contributions, or if your selection of investments does not cover 100% of your contributions, your contributions, or any undirected portion of your contributions, will be invested in the Vanguard Target Retirement Fund appropriate for your date of birth.

Participant Signature _____ Date _____