

Online investment instructions

A simple four-step process to change your investment

With the new mobile-friendly investment instructions form, you can easily rebalance your pension funds* among the Plan's four investment funds for one or all of your accounts without submitting multiple paper forms.

To use the online investment instructions form, log in to your myCSSPEN account and click on **Account Menu > Change Investment**.

Step 1: Determine your risk tolerance (optional)



This optional step helps you determine your risk tolerance using the Risk Tolerance Estimator. This step is recommended for you if you do not already know your investor profile or if you're not sure which investment mix might be right for your particular situation.

However, if you have already decided on the investment mix that is right for you, skip this step.



Step 2: Confirm your information



Look through your information currently on file at CSS to see if it is correct and make any changes required to ensure that your information is up-to-date.

Step 3: Choose your investments



This is the step where you make changes to your investments. You have the option to make changes to either one or all of your accounts (for those that have more than one account). Make sure that the investment mix for the account(s) you are changing equals 100% to be able to proceed to the next step.

If you used the Risk Tolerance Estimator in Step 1, you'll be able to apply the result in this step. If not, you'll need to manually input the changes you want to your investments.

Step 4: Confirm your account changes



This step gives you the opportunity to review your account changes to be sure that they mirror what you had in mind for your investment change and make any last-minute corrections.

Don't have myCSSPEN account? Visit members.csspen.com to register for myCSSPEN now!

*Although the new online investment instructions form enhances the efficiency of rebalancing your pension funds, we do not recommend frequently changing your investments in response to short-term market conditions. Maintaining a long-term investment horizon, even through periods of uncertainty, will typically result in a better long-term outcome than trying to time markets. For more information, please see our market timing information sheet.