Mesirow

CAPITAL GROUP

Mesirow 3(21) Elite List

3Q2026

Report created on 11.09.2026

Mesirow Fiduciary Solutions is a division of Mesirow Financial Investment Management, Inc., an SEC-registered investment advisor. FOR INSTITUTIONAL USE ONLY

Elite list

The following investment options meet Mesirow's minimum criteria for investment option selection. Plan sponsors who select at least one option from each of our four Core Asset Classes (large cap domestic equity, large cap foreign equity, intermediate-term domestic bonds and cash equivalents) qualify for Mesirow's Fiduciary Partnership Service. At the end of this document, you'll find the Definitions and Guidance page, which offers our guidelines for selecting investment options and contains definitions of the various asset classes and investment styles offered.

CORE – Choose a minimum of one investment option from each of these four Core Asset Classes (large cap domestic equity, large cap foreign equity, intermediate-term domestic bonds and cash equivalents) to ensure that the lineup provides minimum asset class exposure for a basic diversified portfolio.

SUPPLEMENTAL – Selecting investment options from these asset classes is optional, but will offer plan participants better potential for diversification.

INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
CORE-LARGE CAP DOMESTIC EQUITY			
American Century Disciplined Core Eq R	AEYRX	Large Core	
American Century Large Cap Equity R	AFDRX	Large Core	
American Funds' Fundamental Investors R-2E	RFEBX	Large Core	
American Funds' The Investment Company of America R-2E	RIBEX	Large Core	
American Funds' Washington Mutual Investors Fund R-2E	RWEBX	Large Core	●
BlackRock Advantage Large Cap Core R	MRLRX	Large Core	
ClearBridge Appreciation R	LMPPX	Large Core	
ClearBridge Dividend Strategy R	LMMRX	Large Core	
Columbia Contrarian Core R	CCCRX	Large Core	
Columbia Large Cap Enhanced Core R	CCERX	Large Core	
Federated Hermes Max-Cap Index R	FMXKX	Large Core	
Fidelity Advisor Capital Development M	FDTZX	Large Core	
Fidelity Advisor Diversified Stock M	FDTEX	Large Core	
Fidelity Advisor Large Cap Stock M	FLAHX	Large Core	
Fidelity Advisor Mega Cap Stock M	FTGRX	Large Core	
Franklin Rising Dividends R	FRDRX	Large Core	
Goldman Sachs Large Cap Equity R	GSPRX	Large Core	
Goldman Sachs Rising Dividend Gr R	GSRRX	Large Core	
Goldman Sachs US Equity Insights R	GSURX	Large Core	
Hartford Core Equity R3	HGIRX	Large Core	
Invesco Charter R	CHRRX	Large Core	
Invesco Main Street All Cap R	OMSNX	Large Core	
Invesco Main Street R	OMGNX	Large Core	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	Invesco Rising Dividends R	ONRDX	Large Core	
	Janus Henderson Growth And Income R	JDNRX	Large Core	
	JPMorgan US Equity R2	JUEZX	Large Core	●
	Lord Abbett Dividend Growth R2	LAMQX	Large Core	
*	MFS Blended Research Core Equity R2	MUESX	Large Core	
*	MFS Core Equity R2	MRERX	Large Core	
*	MFS Massachusetts Investors Tr R2	MIRTX	Large Core	
*	MFS Research R2	MSRRX	Large Core	
	Neuberger Large Cap Growth R3	NGDRX	Large Core	
	PIMCO Stocks PLUS Bond Alpha R	PSPRX	Large Core	
	Putnam Core Equity Fund R	PMYZX	Large Core	
	Putnam U.S. Research R	PRSRX	Large Core	
	T. Rowe Price U.S. Equity Research R	RRCOX	Large Core	
	Victory Diversified Stock R	GRINX	Large Core	
	American Century Disciplined Growth R	ADRRX	Large Growth	
	American Century Focused Dynamic Gr R	ACFCX	Large Growth	
	American Century Growth R	AGWRX	Large Growth	
	American Century Select R	ASERX	Large Growth	
	American Century Ultra® R	AULRX	Large Growth	
	American Funds' AMCAP Fund R-2E	RAEBX	Large Growth	
	American Funds' The Growth Fund of America R-2E	RGEBX	Large Growth	
	BlackRock Advantage Large Cap Gr R	BMCRX	Large Growth	
	BlackRock Capital Appreciation R	MRFGX	Large Growth	
	ClearBridge Large Cap Growth R	LMPLX	Large Growth	
	Columbia Cornerstone Growth R	CGWRX	Large Growth	
	Columbia Large Cap Growth Opp R	CLGPX	Large Growth	
	Columbia Select Large Cap Growth R	URLGX	Large Growth	
	Eaton Vance Growth R	ELCRX	Large Growth	
	Federated Hermes Kaufmann Large Cap R	KLCKX	Large Growth	
	Fidelity Advisor Equity Growth M	FAEGX	Large Growth	
	Fidelity Advisor Growth Opps M	FAGOX	Large Growth	
	Fidelity Advisor New Insights M	FNITX	Large Growth	
	Fidelity Advisor Stock Sel M	FSJHX	Large Growth	
	Franklin DynaTech R	FDNRX	Large Growth	
	Franklin Growth Opportunities R	FKARX	Large Growth	
	Franklin Growth R	FGSRX	Large Growth	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	Goldman Sachs Large Cap Gr Insghts R	GLCRX	Large Growth	
	Hartford Growth Opportunities R3	HGORX	Large Growth	
	Invesco American Franchise R	VAFRX	Large Growth	
	Invesco Discovery Large Cap R	OTCNX	Large Growth	
	Janus Henderson Forty R	JDCRX	Large Growth	
	Janus Henderson Research R	JRARX	Large Growth	
	JPMorgan Growth Advantage R2	JGRJX	Large Growth	
	JPMorgan Large Cap Growth R2	JLGZX	Large Growth	●
*	MFS Blended Research Growth Eq R2	BRWSX	Large Growth	
*	MFS Growth R2	MEGRX	Large Growth	
*	MFS Massachusetts Inv Gr Stk R2	MIRGX	Large Growth	
	PGIM Jennison Growth R	PJGRX	Large Growth	
	Putnam Large Cap Growth R	PGORX	Large Growth	
	T. Rowe Price Blue Chip Growth R	RRBGX	Large Growth	
	T. Rowe Price Growth Stock R	RRGSX	Large Growth	
	Voya Large-Cap Growth R	VGORX	Large Growth	
	American Century Disciplined Value R	AICRX	Large Value	
	American Century Equity Income R	AEURX	Large Value	
	American Century Focused Lg Cap Val R	ALVRX	Large Value	
	American Century Value R	AVURX	Large Value	
	American Funds' American Mutual Fund R-2E	RMEBX	Large Value	
	BlackRock Equity Dividend R	MRDVX	Large Value	
	BlackRock Large Cap Focus Value R	MRBVX	Large Value	
	BrandywineGLOBAL Div US Large Value R	LBDRX	Large Value	
	ClearBridge Value R	LMVRX	Large Value	
	Columbia Dividend Income R	CDIRX	Large Value	
	Columbia Dividend Opportunity R	RSOOX	Large Value	
	Columbia Select Large Cap Value R	SLVRX	Large Value	
	Davis NY Venture R	NYVRX	Large Value	
	Eaton Vance Large-Cap Value R	ERSTX	Large Value	
	Federated Hermes MDT Large Cap Value R	QRLVX	Large Value	
	Fidelity Advisor Stk Selec Lg Cp Val M	FLUTX	Large Value	
	Franklin Equity Income R	FREIX	Large Value	
	Goldman Sachs Equity Income R	GRGRX	Large Value	
	Goldman Sachs Large Cap Value R	GSVRX	Large Value	
	Goldman Sachs Large Cp Val Insghts R	GCVRX	Large Value	
	Hartford Dividend and Growth R3	HDGRX	Large Value	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	Hartford Equity Income R3	HQIRX	Large Value	
	Invesco Comstock R	ACSRX	Large Value	
	Invesco Comstock Select R	CGRNX	Large Value	
	Invesco Diversified Dividend R	DDFRX	Large Value	
	Invesco Dividend Income R	IRTCX	Large Value	
	Invesco Growth and Income R	ACGLX	Large Value	
	JPMorgan Equity Income R2	OIEFX	Large Value	
	JPMorgan Large Cap Value R2	JLVZX	Large Value	
	JPMorgan US Value R2	VGRTX	Large Value	
	JPMorgan Value Advantage R2	JGAQX	Large Value	
	Lord Abbett Affiliated R2	LAFQX	Large Value	
	Lord Abbett Fundamental Equity R2	LAVQX	Large Value	
*	MFS Blended Research Value Equity R2	BRUKX	Large Value	
*	MFS Equity Income R2	EQNSX	Large Value	
*	MFS Low Volatility Equity R2	MLVOX	Large Value	
*	MFS Value R2	MVRRX	Large Value	
	Neuberger Equity Income R3	NBHRX	Large Value	
	Neuberger Large Cap Value R3	NPNRX	Large Value	
	PGIM Jennison Focused Value R	PJORX	Large Value	
	PGIM Jennison Value R	JDVRX	Large Value	
	Putnam Large Cap Value R	PEQRX	Large Value	●
	T. Rowe Price Equity Income R	RRFDX	Large Value	
	Voya Corporate Leaders 100 R	VYCFX	Large Value	
CORE-LARGE CAP FOREIGN EQUITY				
	American Funds' International Growth and Income Fund R-2E	RIIEX	Intl Large Core	●
	BlackRock Advantage International R	BGORX	Intl Large Core	
	Federated Hermes Intl Leaders R	FGFRX	Intl Large Core	
	Franklin International Equity R	LMIRX	Intl Large Core	
	Goldman Sachs Intl Eq Insghts R	GCIRX	Intl Large Core	
	Hartford International Opportunities R3	IHORX	Intl Large Core	
	Janus Henderson Overseas R	JDIRX	Intl Large Core	
	JPMorgan International Equity R2	JIEZX	Intl Large Core	
	JPMorgan International Focus R2	IUERX	Intl Large Core	
	Lord Abbett International Equity R2	LICQX	Intl Large Core	
*	MFS Intl Diversification R2	MDIKX	Intl Large Core	
*	MFS Research International R2	MRSRX	Intl Large Core	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	Putnam Focused International Equity R	PGLRX	Intl Large Core	
	Putnam International Equity R	PIERX	Intl Large Core	
	American Century International Gr R	ATGRX	Intl Large Growth	
	American Funds International Vantage Fund R-2E	RIVHX	Intl Large Growth	
	American Funds' EUPAC Fund R-2E	REEBX	Intl Large Growth	●
	BlackRock International R	BIFRX	Intl Large Growth	
	ClearBridge International Growth R	LMGRX	Intl Large Growth	
	Fidelity Advisor Diversified Intl M	FADIX	Intl Large Growth	
	Fidelity Advisor International Discv M	FTADX	Intl Large Growth	
	Fidelity Advisor International Growth M	FITGX	Intl Large Growth	
	Fidelity Advisor Intl Cap App M	FIATX	Intl Large Growth	
	Fidelity Advisor Overseas M	FOVMX	Intl Large Growth	
	Hartford International Growth R3	HNCRX	Intl Large Growth	
	Hartford Schroders International Stk R3	HSWRX	Intl Large Growth	
	Invesco EQV International Equity R	AIERX	Intl Large Growth	
	Invesco International Diversified R	OIDNX	Intl Large Growth	
	Invesco International Growth R	OIGNX	Intl Large Growth	
*	MFS International Growth R2	MGRQX	Intl Large Growth	
*	MFS International Intrinsic Equity R2	MINFX	Intl Large Growth	
	Neuberger International Sel R3	NBNRX	Intl Large Growth	
	T. Rowe Price International Stock R	RRITX	Intl Large Growth	
	American Century International Val R	ACVRX	Intl Large Value	
	Columbia Overseas Value R	COVUX	Intl Large Value	
	Goldman Sachs International Eq Inc R	GSRKX	Intl Large Value	
	Hartford Schroders Intl Multi-Cp Val R3	HFYRX	Intl Large Value	
	Lord Abbett International Value R2	LIDRX	Intl Large Value	
*	MFS Blended Research Intl Eq R2	BRXSX	Intl Large Value	
	Putnam International Value R	PIIRX	Intl Large Value	
	T. Rowe Price International Value Eq R	RRIGX	Intl Large Value	
CORE-DOMESTIC BONDS				
	American Century Diversified Bond R	ADVRX	Interm-Term Core Bond	
	American Funds' The Bond Fund of America R-2E	RBEBX	Interm-Term Core Bond	●
	Invesco Core Bond R	OPBNX	Interm-Term Core Bond	
	JPMorgan Core Bond R2	JCBZX	Interm-Term Core Bond	
	Lord Abbett Core Fixed Income R2	LCRQX	Interm-Term Core Bond	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	Putnam Core Bond Fund R	PTRKX	Interm-Term Core Bond	
	T. Rowe Price New Income R	RRNIX	Interm-Term Core Bond	
	Columbia Total Return Bond R	CIBRX	Interm-Term Core Plus - High Non-IG	
	JPMorgan Core Plus Bond R2	JCPZX	Interm-Term Core Plus - High Non-IG	
	American Century Core Plus R	ACCPX	Interm-Term Core Plus Bond	
	American Funds Core Plus Bond Fund R-2E	AFPNX	Interm-Term Core Plus Bond	
	American Funds Strategic Bond Fund R-2E	RANHX	Interm-Term Core Plus Bond	●
	Federated Hermes Total Return Bond R	FTRKX	Interm-Term Core Plus Bond	
	Franklin Core Plus Bond Fund R	FKSRX	Interm-Term Core Plus Bond	
	Hartford Total Return Bond R3	ITBRX	Interm-Term Core Plus Bond	
	Invesco Core Plus Bond R	CPBRX	Interm-Term Core Plus Bond	
	Janus Henderson Flexible Bond R	JDFRX	Interm-Term Core Plus Bond	
	Lord Abbett Total Return R2	LTRQX	Interm-Term Core Plus Bond	
*	MFS Total Return Bond R2	MRRRX	Interm-Term Core Plus Bond	
	PGIM Total Return Bond R	DTBRX	Interm-Term Core Plus Bond	
	PIMCO Total Return R	PTRRX	Interm-Term Core Plus Bond	
	Putnam Income R	PIFRX	Interm-Term Core Plus Bond	
	Voya Intermediate Bond R	IIBOX	Interm-Term Core Plus Bond	
	American Funds Corporate Bond Fund R-2E	RCBGX	Interm-Term Corporate Bond	
	Invesco Corporate Bond R	ACCZX	Interm-Term Corporate Bond	
	Lord Abbett Income R2	LAUQX	Interm-Term Corporate Bond	
*	MFS Corporate Bond R2	MBRRX	Interm-Term Corporate Bond	
	American Funds' U.S. Government Securities Fund R-2E	RGEVX	Interm-Term Govt Bond	
	Federated Hermes Short-Interm Govt R	FIGKX	Interm-Term Govt Bond	
	Goldman Sachs Core Fixed Income R	GDFRX	Interm-Term Govt Bond	
*	MFS Government Securities R2	MGVSX	Interm-Term Govt Bond	
	American Century Ginnie Mae R	AGMWX	Mortgage-Backed Bond	
	American Century Government Bond R	ABTRX	Mortgage-Backed Bond	
	American Funds Mortgage Fund R-2E	RMBEX	Mortgage-Backed Bond	
	Eaton Vance Government Opportunities R	ERGOX	Mortgage-Backed Bond	
	Franklin US Government Secs R	FUSRX	Mortgage-Backed Bond	
	Invesco Quality Income R	VUSRX	Mortgage-Backed Bond	
	PGIM Government Income R	JDRVX	Mortgage-Backed Bond	
	Putnam Mortgage Securities R	PGVRX	Mortgage-Backed Bond	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
CORE-CASH EQUIVALENTS				
¥	EB MaGIC Fund 95bps	49327E508	Stable Value	
¥	Federated Hermes Capital Preservation Fund RP	140411208	Stable Value	●
¥	INVESCO Stable Value Trust (105)	46X587XX5	Stable Value	
¥	MetLife Stable Value Fund Series 25053 - Class 68	592176101	Stable Value	
¥	Morley Stable Value Fund 185	852320266	Stable Value	
	American Funds U.S. Government Money Market Fund R-2E	RBEXX	Taxable Money Market	●

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
SUPPLEMENTAL				
	Goldman Sachs High Yield Fl Rate R	GFRRX	Bank Loan/Floating Rate	
	Hartford Floating Rate R3	HFLRX	Bank Loan/Floating Rate	
	Invesco Senior Floating Rate R	OOSNX	Bank Loan/Floating Rate	
	Lord Abbett Floating Rate R2	LFRRX	Bank Loan/Floating Rate	
	Putnam Floating Rate Income R	PFLLX	Bank Loan/Floating Rate	
	Fidelity Advisor Convertible Secs M	FTCVX	Convertibles	
	Lord Abbett Convertible R2	LBCQX	Convertibles	
	Putnam Convertible Securities R	PCVRX	Convertibles	
	American Funds Emerging Markets Bond Fund R-2E	REGHX	Emerging Mkts Bond USD	
	Columbia Emerging Markets Bond R	CMBRX	Emerging Mkts Bond USD	
*	MFS Emerging Markets Debt R2	MEDEX	Emerging Mkts Bond USD	
	American Century Emerging Markets R	AEMRX	Emerging Mkts Core	
	American Funds Developing World Growth and Income Fund R-2E	RDEGX	Emerging Mkts Core	
	Fidelity Advisor Emerg Mkts Discv M	FEDTX	Emerging Mkts Core	
*	Fidelity Advisor Focused Em Mkts M	FTMKX	Emerging Mkts Core	
	Goldman Sachs Em Mkts Eq Insghts R	GRRPX	Emerging Mkts Core	
*	Hartford Schroders Emerging Mkts Eq R3	HHHRX	Emerging Mkts Core	
*	MFS Blended Research Em Mkts Eq R2	BRKSX	Emerging Mkts Core	
*	MFS Emerging Markets Equity R2	MEMFX	Emerging Mkts Core	
	Neuberger Emerg Mkts Eq R3	NEMRX	Emerging Mkts Core	
	Templeton Emerging Markets Equity R	TDMRX	Emerging Mkts Core	
	Voya Multi-Manager Emerging Markets Eq R	IEMKX	Emerging Mkts Core	
	American Funds' New World Fund R-2E	RNEBX	Emerging Mkts Growth	●
	Invesco Developing Markets R	ODVNX	Emerging Mkts Growth	
*	JPMorgan Emerging Markets Equity R2	JHUJX	Emerging Mkts Growth	
	Putnam Emerging Markets Equity R	PEMLX	Emerging Mkts Growth	
	American Funds Global Balanced Fund R-2E	RGGHX	Global Asset Allocation	
	American Funds' Capital Income Builder R-2E	RCEEX	Global Asset Allocation	
	BlackRock Global Allocation R	MRLOX	Global Asset Allocation	
	Eaton Vance Global Income Builder R	EDIRX	Global Asset Allocation	
	Federated Hermes Global Allocation R	FSBKX	Global Asset Allocation	
	Fidelity Advisor Strategic Div & Inc M	FTSDX	Global Asset Allocation	
	Franklin Global Allocation R	FFARX	Global Asset Allocation	
	Invesco Global Allocation R	QGRNX	Global Asset Allocation	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	JPMorgan Global Allocation R2	GAONX	Global Asset Allocation	
*	MFS Global Total Return R2	MGBRX	Global Asset Allocation	
	American Funds' Capital World Bond Fund R-2E	RCEBX	Global Bond Non-USD	
	BrandywineGLOBAL Global Opp Bond R	LBORX	Global Bond Non-USD	
	Invesco Global Strategic Income R	OSINX	Global Bond Non-USD	
	Invesco International Bond R	OIBNX	Global Bond Non-USD	
	Templeton Global Bond R	FGBRX	Global Bond Non-USD	
	Voya Global Bond R	IGBRX	Global Bond Non-USD	
*	MFS Global Opportunistic Bd R2	MGBLX	Global Bond USD	
	PIMCO International Bond (USD-Hdg) R	PFRRX	Global Bond USD	
	American Funds Global Insight Fund R-2E	RGLHX	Global Large Core	
	American Funds' Capital World Growth and Income Fund R-2E	RWBEX	Global Large Core	
	BlackRock Advantage Global R	MRGSX	Global Large Core	
	Goldman Sachs Dynamic Global Eq R	GAPRX	Global Large Core	
	Janus Henderson Global Select R	JORRX	Global Large Core	
	American Century Focused Global Gr R	AGORX	Global Large Growth	
	American Funds Global Growth Portfolio R-2E	REBGX	Global Large Growth	
	American Funds' New Perspective Fund R-2E	RPEBX	Global Large Growth	●
	American Funds' The New Economy Fund R-2E	RNNEX	Global Large Growth	
	BlackRock Unconstrained Equity R	MREGX	Global Large Growth	
	Fidelity Advisor Worldwide M	FWTFX	Global Large Growth	
	Invesco Global Core Equity R	AWSRX	Global Large Growth	
	Invesco Global Focus R	GLVNX	Global Large Growth	
	Invesco Global R	OGLNX	Global Large Growth	
	Janus Henderson Global Research R	JDWRX	Global Large Growth	
*	MFS Global Growth R2	MGWRX	Global Large Growth	
	Columbia Global Value R	REVRX	Global Large Value	
	Franklin Mutual Global Discovery R	TEDRX	Global Large Value	
*	MFS Low Volatility Global Equity R2	MVGKX	Global Large Value	
	PGIM Jennison Global Equity Income R	PJERX	Global Large Value	
	American Funds' SMALLCAP World Fund R-2E	RSEBX	Global Small/Mid	●
*	MFS Global New Discovery R2	GLNKX	Global Small/Mid	
	American Century High-Yield R	AHYRX	High Yield	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	American Funds' American High-Income Trust R-2E	RTEHX	High Yield	●
	BlackRock High Yield R	BHYRX	High Yield	
	Columbia High Yield Bond R	CHBRX	High Yield	
	Eaton Vance Income Fund of Boston R	ERIBX	High Yield	
	Franklin High Income R	FHIRX	High Yield	
	Goldman Sachs High Yield R	GSHRX	High Yield	
	Janus Henderson High-Yield R	JHYRX	High Yield	
	Lord Abbett High Yield R2	LHYQX	High Yield	
*	MFS High Income R2	MIHRX	High Yield	
	Neuberger High Income Bond R3	NHIRX	High Yield	
	PGIM High Yield R	JDYRX	High Yield	
	PIMCO High Yield R	PHYRX	High Yield	
*	Putnam High Yield M	PHYMX	High Yield	
	Putnam High Yield R	PFJAX	High Yield	
	Voya High Yield Bond R	IRSTX	High Yield	
*	MFS Global High Yield R2	MHOSX	High Yield - High Intl	
	American Century Inflation Adjs Bond R	AIARX	Inflation-Linked Bond	
	American Century Short Dur Inf PrBd R	APORX	Inflation-Linked Bond	
	American Funds Inflation Linked Bond Fund R-2E	RILGX	Inflation-Linked Bond	●
	Goldman Sachs Infl Protected Secs R	GSRPX	Inflation-Linked Bond	
	Hartford Inflation Plus R3	HIPRX	Inflation-Linked Bond	
	Lord Abbett Inflation Focused R2	LIFQX	Inflation-Linked Bond	
	Lord Abbett Inflation Focused R3	LIFRX	Inflation-Linked Bond	
*	MFS Inflation-Adjusted Bond R2	MIATX	Inflation-Linked Bond	
	PIMCO Real Return R	PRRRX	Inflation-Linked Bond	
	Lord Abbett International Opp R2	LINQX	Intl Small/Mid Core	
	Putnam International Small Cap R	PICRX	Intl Small/Mid Core	
	American Century International Opps R	AIORX	Intl Small/Mid Growth	
	Invesco International Small-Mid Com R	OSMNX	Intl Small/Mid Growth	
*	MFS International New Discovery R2	MIDRX	Intl Small/Mid Growth	
	BlackRock Advantage SMID Cap R	MRSPX	Mid Core	
	Eaton Vance Atlanta Capital SMID-Cap R	ERSMX	Mid Core	
	Fidelity Advisor Mid Cap II M	FITIX	Mid Core	
	Fidelity Advisor Stock Selec Mid Cp M	FMCAX	Mid Core	
	Goldman Sachs Mid Cap Value R	GCMRX	Mid Core	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	Goldman Sachs Small/Mid Cap Equity R	GMVRX	Mid Core	
	Hartford Schroders US MidCap Opps R3	HFDRX	Mid Core	
	Invesco Equally-Wtd S&P 500 R	VADRX	Mid Core	
	Invesco Main Street Mid Cap R	OPMNX	Mid Core	
	Janus Henderson Contrarian R	JCNRX	Mid Core	
	Lord Abbett Value Opportunities R2	LVOQX	Mid Core	
	Voya MI Dynamic SMID Cap R	VYMVX	Mid Core	
	American Century Heritage R	ATHWX	Mid Growth	
	BlackRock Mid-Cap Growth Equity R	BMRRX	Mid Growth	
	ClearBridge Mid Cap Growth R	LCMRX	Mid Growth	
	Federated Hermes Kaufmann R	KAUFX	Mid Growth	
	Franklin Small-Mid Cap Growth R	FSMRX	Mid Growth	
	Goldman Sachs Mid Cap Growth R	GGORX	Mid Growth	
	Goldman Sachs Small/Mid Cap Growth R	GTMRX	Mid Growth	
	Invesco Discovery Mid Cap Growth R	OEGNX	Mid Growth	
	Janus Henderson Enterprise R	JDMRX	Mid Growth	
	JPMorgan Mid Cap Growth R2	JMGZX	Mid Growth	
	Lord Abbett Growth Opportunities R2	LGOQX	Mid Growth	
*	MFS Mid Cap Growth R2	MCPRX	Mid Growth	
	Neuberger Mid Cap Growth R3	NMGRX	Mid Growth	
	PGIM Jennison Mid-Cap Growth R	JDERX	Mid Growth	
*	T. Rowe Price Mid-Cap Growth R	RRMGX	Mid Growth	
	Voya MidCap Opportunities R	IMORX	Mid Growth	
	American Century Mid Cap Value R	AMVRX	Mid Value	
	BlackRock Mid-Cap Value R	MRRFX	Mid Value	
	Columbia Select Mid Cap Value R	CMVRX	Mid Value	
	Fidelity Advisor Mid Cap Value M	FMPTX	Mid Value	
	Fidelity Advisor Value M	FTVFX	Mid Value	
	Fidelity Advisor Value Strategies M	FASPX	Mid Value	
	Franklin Mutual U.S. Mid Cap Value R	FBSRX	Mid Value	
	Invesco Value Opportunities R	VVORX	Mid Value	
	Janus Henderson Mid Cap Value R	JDPRX	Mid Value	
*	JPMorgan Mid Cap Value R2	JMVZX	Mid Value	
	Lord Abbett Mid Cap Stock R2	LMCQX	Mid Value	
*	MFS Mid Cap Value R2	MCVRX	Mid Value	
*	Patient Opportunity R	LMORX	Mid Value	
	T. Rowe Price Mid-Cap Value R	RRMVX	Mid Value	

* This investment option is closed to new plans

Elite list

INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
Victory Sycamore Established Value R	GETGX	Mid Value	
American Funds Multi-Sector Income Fund R-2E	RMDPX	Multi-Sector Bond	
Columbia Strategic Income R	CSNRX	Multi-Sector Bond	
Lord Abbett Bond-Debenture R2	LBNQX	Multi-Sector Bond	
PIMCO Income R	PONRX	Multi-Sector Bond	
American Century Short Duration R	ACSPX	Short-Term Bond	
American Funds Preservation Portfolio R-2E	RPBEX	Short-Term Bond	
American Funds' Intermediate Bond Fund of America R-2E	REBBX	Short-Term Bond	
American Funds' Short-Term Bond Fund of America R-2E	RAAEX	Short-Term Bond	
BlackRock Low Duration Bond R	BLDPX	Short-Term Bond	
Goldman Sachs Short Duration Bond R	GIFRX	Short-Term Bond	
Invesco Short Term Bond R	STBRX	Short-Term Bond	
Lord Abbett Short Duration Income R3	LDLRX	Short-Term Bond	
PGIM Short-Term Corporate Bond R	JDTRX	Short-Term Bond	
PIMCO Low Duration R	PLDRX	Short-Term Bond	
Putnam Short Duration Bond R	PRARX	Short-Term Bond	
Voya Short Duration Bond R	VSTRX	Short-Term Bond	
Hartford Short Duration R3	HSDRX	Short-Term Bond - High Non-IG	
American Century Short-Term Govt R	TWARX	Short-Term Govt Bond	
American Century Small Company R	ASCRX	Small Core	
ClearBridge Small Cap R	LMARX	Small Core	
Fidelity Advisor Small Cap M	FSCTX	Small Core	
Goldman Sachs Small Cap Eq Insghts R	GDSRX	Small Core	
Goldman Sachs Small Cap Value R	GSQRX	Small Core	
Hartford Schroders US Small Cap Opps R3	HOORX	Small Core	
Invesco Main Street Small Cap R	OSCNX	Small Core	
Invesco Small Cap Equity R	SMERX	Small Core	
JPMorgan Small Cap Equity R2	JSEZX	Small Core	
JPMorgan US Small Company R2	JSCZX	Small Core	●
Voya MI Dynamic Small Cap R	VYSDX	Small Core	
American Century Small Cap Growth R	ANORX	Small Growth	
BlackRock Advantage Small Cap Gr R	BSGRX	Small Growth	
Columbia Small Cap Growth R	CCRIX	Small Growth	
Eaton Vance Small-Cap R	ERSGX	Small Growth	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	Federated Hermes Kaufmann Small Cap R	FKKSX	Small Growth	
	Franklin Small Cap Growth R	FSSRX	Small Growth	
	Goldman Sachs Small Cap Gr Insghts R	GSROX	Small Growth	
	Hartford Small Cap Growth R3	HSLRX	Small Growth	
	Hartford Small Company R3	IHSRX	Small Growth	
	Janus Henderson Triton R	JGMRX	Small Growth	
*	JPMorgan Small Cap Growth R2	JSGZX	Small Growth	
*	MFS New Discovery R2	MNDRX	Small Growth	
	Neuberger Small Cap Growth R3	NSNRX	Small Growth	
	PGIM Jennison Small Company R	JSCRX	Small Growth	
*	Putnam Small Cap Growth R	PSGRX	Small Growth	
	Columbia Small Cap Value Discv R	CSVRX	Small Value	
	Federated Hermes MDT Small Cap Value R	VSFRX	Small Value	
*	Franklin Small Cap Value R	FVFRX	Small Value	
	Goldman Sachs Small Cp Val Insghts R	GTTRX	Small Value	
	Hartford Small Cap Value R3	HSMRX	Small Value	
	Janus Henderson Small Cap Value R	JDSRX	Small Value	
	JPMorgan Small Cap Value R2	JSVZX	Small Value	
	Lord Abbett Small Cap Value R2	LRSQX	Small Value	
*	MFS Blended Research Small Cap Eq R2	BRSSX	Small Value	
*	MFS New Discovery Value R2	NDVSX	Small Value	
	Putnam Small Cap Value R	PSCRX	Small Value	
	Royce Small-Cap Opportunity R	ROFRX	Small Value	
	Royce Small-Cap Total Return R	RTRRX	Small Value	
*	Undiscovered Managers Behavioral Val R2	UBVRX	Small Value	
	Victory Integrity Small-Cap Value R	MRVSX	Small Value	
	Victory Sycamore Small Company Opp R	GOGFX	Small Value	
	Lord Abbett Alpha Strategy R2	ALFQX	Specialty - Aggressive Allocation	
	Goldman Sachs Commodity Strategy R	GCCRX	Specialty - Commodities Diversified	
	PIMCO Commodity and Real Ret Bd Alp R	PCSRX	Specialty - Commodities Diversified	●
*	MFS Global Real Estate R2	MGLKX	Specialty - Global Real Estate	
	PGIM Global Real Estate R	PURRX	Specialty - Global Real Estate	
	Goldman Sachs Absolute Ret Trckr R	GRRTX	Specialty - Multialternative	
	American Funds Conservative Growth and Income Portfolio R-2E	RNBEX	Specialty - Real Asset	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	BlackRock Balanced R	MRBPX	Specialty - Real Asset	
	Franklin Income R	FISRX	Specialty - Real Asset	
	American Century Real Estate R	AREWX	Specialty - Real Estate	●
	Goldman Sachs Real Estate Securities R	GRERX	Specialty - Real Estate	
	Invesco Real Estate R	IARRX	Specialty - Real Estate	
	Neuberger Real Estate R3	NRERX	Specialty - Real Estate	
	Hartford Multi Asset Inc R3	ITTRX	Tactical Asset Allocation	
	Invesco Active Allocation R	OAANX	Tactical Asset Allocation	
	Invesco Balanced-Risk Allocation R	ABRRX	Tactical Asset Allocation	
	Lord Abbett Multi-Asset Balanced Opp R2	BLAQX	Tactical Asset Allocation	
	PIMCO All Asset R	PATRX	Tactical Asset Allocation	
	American Funds Growth Portfolio R-2E	RBGEX	Target Risk Aggressive	
	Fidelity Advisor Asset Manager 85% M	FEYTX	Target Risk Aggressive	
*	MFS Aggressive Growth Allocation R2	MAWAX	Target Risk Aggressive	
	American Century Strat Allc: Agrsv R	AAARX	Target Risk Moderate Aggressive	
	American Funds Growth and Income Portfolio R-2E	RBEGX	Target Risk Moderate Aggressive	
	American Funds' The Income Fund of America R-2E	RIEBX	Target Risk Moderate Aggressive	
	BlackRock 80/20 Target Allocation R	BRAPX	Target Risk Moderate Aggressive	
	Columbia Capital Allocation Agrsv R	CPARX	Target Risk Moderate Aggressive	
	Fidelity Advisor Asset Manager 70% M	FTASX	Target Risk Moderate Aggressive	
	Franklin Dynamic Asset Allocation Gr R	PASRX	Target Risk Moderate Aggressive	
	Franklin Growth Allocation R	FGTRX	Target Risk Moderate Aggressive	
	Hartford Moderately Aggressive Allc R3	HRARX	Target Risk Moderate Aggressive	
SUPPLEMENTAL - POSSIBLE QDIA				
	American Funds 2010 Target Date Retirement Income Fund R-2E	RBEAX	Target Date 2000-2010	●
	American Funds 2015 Target Date Retirement Income Fund R-2E	RBEJX	Target Date 2015	●
	American Funds 2020 Target Date Retirement Income Fund R-2E	RBEHX	Target Date 2020	●
	American Funds 2025 Target Date Retirement Income Fund R-2E	RBEDX	Target Date 2025	●
	American Funds 2030 Target Date Retirement Fund R-2E	RBEEX	Target Date 2030	●
	American Funds 2035 Target Date Retirement Fund R-2E	RBEFX	Target Date 2035	●

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	American Funds 2040 Target Date Retirement Fund R-2E	RBEKX	Target Date 2040	●
	American Funds 2045 Target Date Retirement Fund R-2E	RBHHX	Target Date 2045	●
	American Funds 2050 Target Date Retirement Fund R-2E	RBHEX	Target Date 2050	●
	American Funds 2055 Target Date Retirement Fund R-2E	RBEMX	Target Date 2055	●
	American Funds 2060 Target Date Retirement Fund R-2E	RBENX	Target Date 2060	●
	American Funds 2065 Target Date Retirement Fund R-2E	RBEOX	Target Date 2065	●
	American Funds 2070 Target Date Retirement Fund R-2E	RBAHX	Target Date 2070+	●
	Columbia Income Builder R	CBURX	Target Risk Conservative	
	Fidelity Advisor Asset Manager 20% M	FTDWX	Target Risk Conservative	
	Fidelity Advisor Asset Manager 30% M	FTTNX	Target Risk Conservative	
	American Century Strat Allc: Mod R	ASMRX	Target Risk Moderate	
	American Funds Moderate Growth and Income Portfolio R-2E	RBBEX	Target Risk Moderate	
	American Funds Retirement Income Portfolio - Enhanced R-2E	RIRPX	Target Risk Moderate	
	American Funds Retirement Income Portfolio - Moderate R-2E	RHRPX	Target Risk Moderate	
	American Funds' American Balanced Fund R-2E	RAMHX	Target Risk Moderate	●
	BlackRock 60/40 Target Allocation R	BRGPX	Target Risk Moderate	
	Columbia Balanced R	CBLRX	Target Risk Moderate	
	Fidelity Advisor Asset Manager 50% M	FFTMX	Target Risk Moderate	
	Fidelity Advisor Asset Manager 60% M	FSATX	Target Risk Moderate	
	Franklin Dynamic Asset Allocation Bal R	PAARX	Target Risk Moderate	
	Franklin Moderate Allocation R	FTMRX	Target Risk Moderate	
	George Putnam Balanced R	PGPRX	Target Risk Moderate	
	Hartford Checks and Balances R3	HCKRX	Target Risk Moderate	
	Hartford Moderate Allocation R3	HBARX	Target Risk Moderate	
	Invesco Equity and Income R	ACESX	Target Risk Moderate	
	Janus Henderson Balanced R	JDBRX	Target Risk Moderate	
*	MFS Moderate Allocation R2	MARRX	Target Risk Moderate	
*	MFS Total Return R2	MTRRX	Target Risk Moderate	

* This investment option is closed to new plans

Elite list

	INVESTMENT OPTION NAME	ID	CATEGORY	MESIROW 3(21) FUND LINEUP
	PGIM Balanced R	PALRX	Target Risk Moderate	
	American Century Strat Allc: Cnsrv R	AACRX	Target Risk Moderate Conservative	
	American Funds Retirement Income Portfolio - Conservative R-2E	RGRPX	Target Risk Moderate Conservative	
	BlackRock 40/60 Target Allocation R	BRMPX	Target Risk Moderate Conservative	
	Fidelity Advisor Asset Manager 40% M	FFNTX	Target Risk Moderate Conservative	
	Franklin Conservative Allocation R	FTCRX	Target Risk Moderate Conservative	
	Franklin Dynamic Asset Allocation Cnsv R	PACRX	Target Risk Moderate Conservative	
	Hartford Balanced Income R3	HBLRX	Target Risk Moderate Conservative	
	Hartford Conservative Allocation R3	HCVRX	Target Risk Moderate Conservative	
	Lord Abbett Multi-Asset Income R2	LIGQX	Target Risk Moderate Conservative	
*	MFS Conservative Allocation R2	MCARX	Target Risk Moderate Conservative	

* This investment option is closed to new plans

Mesirow

Mesirow 3(21) Fund Lineup

The Mesirow 3(21) Fund Lineup gives participants a variety of choices, with funds both in Mesirow's four Core Asset Classes and in Supplemental Asset Classes that may include but are not limited to Target Date, Target Risk, High Yield, Inflation-Linked Bond, Emerging Markets, Commodities Diversified, Real Estate, Global Equity, and Small Cap funds.

CORE

INVESTMENT OPTION NAME	CATEGORY
CORE-LARGE CAP DOMESTIC EQUITY	
American Funds' Washington Mutual Investors Fund R-2E	Large Core
JPMorgan US Equity R2	Large Core
JPMorgan Large Cap Growth R2	Large Growth
Putnam Large Cap Value R	Large Value
CORE-LARGE CAP FOREIGN EQUITY	
American Funds' International Growth and Income Fund R-2E	Intl Large Core
American Funds' EUPAC Fund R-2E	Intl Large Growth
CORE-DOMESTIC BONDS	
American Funds' The Bond Fund of America R-2E	Interm-Term Core Bond
American Funds Strategic Bond Fund R-2E	Interm-Term Core Plus Bond
CORE-CASH EQUIVALENTS	
¥ Federated Hermes Capital Preservation Fund RP	Stable Value
American Funds U.S. Government Money Market Fund R-2E	Taxable Money Market

SUPPLEMENTAL

INVESTMENT OPTION NAME	CATEGORY
American Funds' New World Fund R-2E	Emerging Mkts Growth
American Funds' New Perspective Fund R-2E	Global Large Growth
American Funds' SMALLCAP World Fund R-2E	Global Small/Mid
American Funds' American High-Income Trust R-2E	High Yield
American Funds Inflation Linked Bond Fund R-2E	Inflation-Linked Bond
JPMorgan US Small Company R2	Small Core
PIMCO Commodity and Real Ret Bd Alp R	Specialty - Commodities Diversified
American Century Real Estate R	Specialty - Real Estate
TARGET DATE AND ALLOCATION	
American Funds 2010 Target Date Retirement Income Fund R-2E	Target Date 2000-2010
American Funds 2015 Target Date Retirement Income Fund R-2E	Target Date 2015
American Funds 2020 Target Date Retirement Income Fund R-2E	Target Date 2020
American Funds 2025 Target Date Retirement Income Fund R-2E	Target Date 2025
American Funds 2030 Target Date Retirement Fund R-2E	Target Date 2030
American Funds 2035 Target Date Retirement Fund R-2E	Target Date 2035
American Funds 2040 Target Date Retirement Fund R-2E	Target Date 2040
American Funds 2045 Target Date Retirement Fund R-2E	Target Date 2045
American Funds 2050 Target Date Retirement Fund R-2E	Target Date 2050
American Funds 2055 Target Date Retirement Fund R-2E	Target Date 2055
American Funds 2060 Target Date Retirement Fund R-2E	Target Date 2060
American Funds 2065 Target Date Retirement Fund R-2E	Target Date 2065

* This investment option is closed to new plans

Mesirow 3(21) Fund Lineup

SUPPLEMENTAL

INVESTMENT OPTION NAME	CATEGORY
American Funds 2070 Target Date Retirement Fund R-2E	Target Date 2070+
American Funds' American Balanced Fund R-2E	Target Risk Moderate

* This investment option is closed to new plans

Definitions and Guidance

The following overview provides Mesirow's recommended guidelines. We encourage you to review this information prior to selecting your investments.

CORE AND SUPPLEMENTAL ASSET CLASSES

- Core Asset Classes are asset classes that should be offered in your plan to ensure that the lineup provides minimum asset class exposure for a basic diversified portfolio.
- **Please select at least one investment option from each of the Core Asset Classes for your investment lineup.**
- Supplemental Asset Classes are optional, but their inclusion may be valuable to participants who possess more investment experience, understand the risks associated with specialized asset classes, and seek greater diversification opportunities.
- **You may select as many investment options as you would like from the Supplemental Asset Classes for your investment lineup.**

ACTIVE VERSUS PASSIVE INVESTMENT OPTIONS

- Portfolio managers of active investment options seek to outperform an established market benchmark by handpicking securities and/or betting on certain segments of the market. Active investment options offer the potential for better returns than their passive peers, but often at the cost of greater volatility (i.e. larger performance swings) and higher expense ratios.
- Passive investment options, commonly known as index options, are those that seek to track the performance of a market benchmark. Passive investment options generally have lower volatility and expense ratios than active investment options of the same category.
- Choosing active investment options, passive investment options or both types is ultimately up to the plan sponsor. Active strategies tend to work better in some asset classes than others.
- **Our guideline recommendation for plan sponsors is to select at least one active fund and one passive fund in each of the Core Asset Classes, when possible, to give plan participants the flexibility to select a strategy that is most appropriate for their goals and objectives.**

GROWTH, VALUE AND CORE INVESTMENT OPTIONS

- For domestic equities, our Core Asset Classes are comprised of core investment options, which provide a mix of growth and value style exposures. Managers of growth and value investment options do not share the same stock-picking style.
- Managers of growth investment options tend to invest in companies that they believe will experience attractive earnings growth. Typically, growth-oriented managers are less price conscious than their value-oriented peers.
- Managers of value investment options invest in companies that they believe are under priced by the market.
- **Our guideline recommendation for plan sponsors who are adding a style-specific investment option is to provide investment options that represent both styles to satisfy different investor preferences and to avoid style biases within the plan's investment lineup.**

EMERGING MARKET INVESTMENT OPTIONS

- Emerging market investment options typically focus on stocks issued in developing economies. Emerging market investment options may be appropriate for a diversified investment lineup. However, plan sponsors should note that historically this asset class has exhibited higher return volatility (risk) than the international asset class.
- Investments that invest internationally involve risks not associated with investing solely in the U.S., such as currency fluctuation, political risk, differences in accounting and the limited availability of information.

HIGH YIELD INVESTMENT OPTIONS

- High yield investment options typically focus on bonds that are rated below investment grade. To compensate investors for the added credit risk, high yield bonds typically offer greater yield than investment grade bonds. High yield investment options may be appropriate for a diversified investment lineup. However, plan sponsors should note that this asset class has exhibited higher return volatility (risk) than our Core Asset Class of Domestic Bonds.
- An investment in high yield securities may be subject to more credit risks than higher quality securities.

REAL ESTATE INVESTMENT OPTIONS

- Real estate investment options typically focus on Real Estate Investment Trusts (REITs), which invest in a portfolio of real estate or in companies in the real estate industry. Real estate investment options may be appropriate for a diversified investment lineup. However, plan sponsors should note that this asset class poses sector-specific risk.
- Investments that focus on real estate investing are sensitive to economic and business cycles, changing demographic patterns and government actions.

TARGET RISK AND TARGET DATE INVESTMENT OPTIONS

The following investment options are encouraged for plans that wish to give participants the ability to achieve diversification through a single investment portfolio.

- Target Risk – A participant should choose the target risk portfolio that best matches his or her risk level. Allocations to various asset classes stay constant over time, so a participant may need to change portfolios should his or her risk profile change.
- Target Date – A participant should choose the target date portfolio that is closest to his or her anticipated retirement date. Unlike target risk investment options, which have a fixed asset allocation, target date investment options have allocations that automatically adjust over time, so that the portfolio becomes more conservative (typically, less equities and more fixed income and cash or cash equivalents) as the retirement date draws closer. This minimizes the need for participants to change portfolios.

Neither principal nor the underlying assets of target date investments are guaranteed at any time, including the target date. Investment risk remains at all times. There is no assurance that the recommended asset allocation will either maximize returns or minimize risk or be the appropriate allocation in all circumstances for every investor with a particular time horizon.

* This investment option is closed to new plans

Disclosure

MESIROW FOOTNOTES AND DISCLOSURE

¥ With respect to a Stable Value or Fixed Account product, the crediting rate that participants receive may be driven by a number of different factors, including, but not limited to, the current interest rate environment, underlying expenses and expense structure, the share class(es) or version(s) of the product that are available on the recordkeeping platform used by the Plan. A Stable Value or Fixed Account product may impose restrictions and/or market rate adjustments at contract termination. As a result, a Plan Sponsor should carefully review the applicable product documents (including any applicable contract) for the applicable limits, rules and payout options.

Cash Equivalents in Mesirow Lineups: The Mesirow 3(21) Fund Lineup offers a Stable Value Fund and a Money Market Fund. The Money Market Fund is intended for use by 403(b) plans that cannot use a Stable Value Fund. The Stable Value Fund is intended for use by all other plan types.

* This investment option may be closed to new plans.

Mesirow Fiduciary Solutions is a division of Mesirow Financial Investment Management, Inc. The information provided herein is for informational purposes only and should not be construed as a recommendation to purchase or sell any particular security or investment vehicle(s) offered by Mesirow Financial Investment Management, Inc. or its affiliates. The information contained herein has been obtained from sources believed to be reliable, but is not necessarily complete and its accuracy cannot be guaranteed. Any opinions expressed are subject to change without notice. Other Mesirow affiliates may receive fees for selling or advising on the purchase or sale of products mentioned herein. Additionally, Mesirow affiliates may also receive fees paid by manufacturers or distributors of said products in connection to other professional services provided by the applicable Mesirow affiliate. The sale or advice provided is in no way related or contingent upon the payment received for these other services. It should not be assumed that any recommendations incorporated herein will be profitable or will equal past performance. Mesirow does not provide legal or tax advice. Advisory services offered through Mesirow Financial Investment Management, Inc., an SEC-registered investment advisor. Advisory Fees are described in Mesirow Financial Investment Management, Inc.'s Part 2A of the Form ADV. Mesirow refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow name and logo are registered service marks of Mesirow Financial Holdings, Inc. © 2026. All rights reserved.

CAPITAL GROUP FOOTNOTES

*Plans must have the American Funds Target Date Retirement Series as the QDIA (qualified default investment alternative); takeover plans must have completed a target date fund mapping conversion or re-enrollment.

* This investment option is closed to new plans