





### 3. Allocation instructions for future contributions

- If you have added additional Investment Options in **Section 2**, please be sure that the allocations below reflect the correct Investment Options.
- Your future contributions will be invested in the Investment Options indicated below; it will not affect assets currently held in your Account.
- Please select one or more Investment Options from the choices below. If you choose one Investment Option please indicate 100% next to that option. If you choose more than one Investment Option please indicate the percentage amount of the assets you would like to invest into each of the selected Options.

#### Age-Based Portfolios:

Invesco CollegeBound Today Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2019-2020 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2021-2022 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2023-2024 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2025-2026 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2027-2028 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2029-2030 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2031-2032 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2033-2034 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2035-2036 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2037-2038 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%

#### Choose one (1) Share Class:

- Class A  
(RI State Resident - Class RZ)
- Class C  
(RI State Resident - Class RA)
- Class I  
(For Account Owners who have an account with a Registered Investment Advisor)

#### Target Risk Portfolios:

Invesco Conservative College Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Moderate College Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Growth College Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%

#### Individual Options:

Invesco Stable Value Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Short Duration Inflation Protected Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Core Plus Bond Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Equally-Weighted S&P 500 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Diversified Dividend Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco FTSE RAFI US 1500 Small-Mid Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Small Cap Growth Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco International Growth Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco FTSE RAFI Developed Markets ex-U.S. Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Equity and Income Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Global Sustainable Equity Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%

**Total**       %

#### 4. Signature — YOU MUST SIGN BELOW

- I certify that I have read, understand, consent, and agree to all the terms and conditions of the CollegeBound 529 Program Description and understand the rules and regulations of CollegeBound 529 as they relate to this Investment Option Change/Future Contribution Allocation request.
- By signing below, I authorize CollegeBound 529 or its designees to change my Investment Options and/or my allocations for future contributions according to the instructions above.
- If the Account is owned by an entity or trust, I certify that I am authorized to act on its behalf in making this request. If the Account is funded with UGMA/UTMA assets, I further certify that I am the parent/guardian/custodian of the Account in question, and that the request is in the best interest of the Beneficiary.

SIGNATURE

Signature of Account Owner

□□ — □□ — □□□□

Date (mm/dd/yyyy)



State of Rhode Island  
Office of the General Treasurer  
Seth Magaziner

