CollegeBound 529

CollegeBound 529

Investment Option Change/Future Contribution Allocation Form

- Use this form to request one of your twice per calendar year Investment Option changes or to change your future contribution allocations.
- Complete **Section 2** to change your current Investment Options to new Investment Options. (You can do this only twice per calendar year.)
- Complete **Section 3** to change your Investment Option(s) instructions for future contributions.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.

Forms can be downloaded from our website at www.collegebound529.com, or you can call us to order any form—or request assistance in completing this form—at **1.877.615.4116** any business day from 8 a.m. to 8 p.m. Eastern time.



1.877.615.4116

8 a.m. to 8 p.m. Eastern Time M-F



www.collegebound529.com

Regular mailing address:

CollegeBound 529 P.O. Box 55987 Boston, MA 02205-9722

Overnight mailing address:

CollegeBound 529 95 Wells Ave. Suite 155 Newton, MA 02459

Name of Account Owner (first, middle initial, last)		

Name of Beneficiary (first, middle initial, last)

1. Account information



2. Investment Option Change

- For each Investment Option you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the CollegeBound 529 Program Description, available at **www.collegebound529.com,** for complete information on Investment Options.
- 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.

Remember: Federal law allows Account Owners to make two Investment Option changes each calendar year.

Note: This change applies only to the assets currently held in your Account; it will not affect the allocation of your future investments.

Exchange FROM		Investment Option	Exchange TO
All	Percentage	Age-Based Portfolios	
OR	%	Invesco CollegeBound Today Portfolio	%
OR	%	Invesco CollegeBound 2019-2020 Portfolio	%
OR	%	Invesco CollegeBound 2021-2022 Portfolio	<u> </u>
OR	%	Invesco CollegeBound 2023-2024 Portfolio	%
OR	<u></u> %	Invesco CollegeBound 2025-2026 Portfolio	%
OR	<u></u> %	Invesco CollegeBound 2027-2028 Portfolio	%
OR	%	Invesco CollegeBound 2029-2030 Portfolio	%
OR	%	Invesco CollegeBound 2031-2032 Portfolio	<u> </u>
OR	%	Invesco CollegeBound 2033-2034 Portfolio	%
OR	%	Invesco CollegeBound 2035-2036 Portfolio	%
OR	<u></u> %	Invesco CollegeBound 2037-2038 Portfolio	
		Target Risk Portfolios:	
OR	<u></u> %	Invesco Conservative College Portfolio	%
OR	%	Invesco Moderate College Portfolio	\\\
OR	<u></u> %	Invesco Growth College Portfolio	<u> </u>
		Individual Options:	
OR	<u></u> %	Invesco Stable Value Portfolio	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
OR	<u></u> %	Invesco Short Duration Inflation Protected Portfolio	
OR	<u></u> %	Invesco Core Plus Bond Portfolio	
OR	<u></u> %	Invesco Equally-Weighted S&P 500 Portfolio	
OR		Invesco Diversified Dividend Portfolio	
OR	%	Invesco FTSE RAFI US 1500 Small-Mid Portfolio	
OR	<u></u> %	Invesco Small Cap Growth Portfolio	
OR	<u></u> %	Invesco International Growth Portfolio	
OR	%	Invesco FTSE RAFI Developed Markets ex-U.S. Portfolio	\
OR	<u></u> %	Invesco Equity and Income Portfolio	\
OR	%	Invesco Global Sustainable Equity Portfolio	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\
			100%

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					%	
Invesco CollegeBound 2019-2020 Portfolio					%	Choose one (1) Share Class:
Invesco CollegeBound 2021-2022 Portfolio					%	Class A
Invesco CollegeBound 2023-2024 Portfolio					%	(RI State Resident - Class RZ)
Invesco CollegeBound 2025-2026 Portfolio					%	Class C
Invesco CollegeBound 2027-2028 Portfolio					%	(RI State Resident - Class RA)
Invesco CollegeBound 2029-2030 Portfolio					%	(iii state needaant sidee iii ,
Invesco CollegeBound 2031-2032 Portfolio					%	Class I
Invesco CollegeBound 2033-2034 Portfolio					%	(For Account Owners who have an account with a Registered
Invesco CollegeBound 2035-2036 Portfolio					%	Investment Advisor)
Invesco CollegeBound 2037-2038 Portfolio					%	
Target Risk Portfolios:						
Invesco Conservative College Portfolio					%	
Invesco Moderate College Portfolio					%	
Invesco Growth College Portfolio					%	
Individual Options:						
Invesco Stable Value Portfolio					%	
Invesco Short Duration Inflation Protected Portfolio					%	
Invesco Core Plus Bond Portfolio					%	
Invesco Equally-Weighted S&P 500 Portfolio					%	
Invesco Diversified Dividend Portfolio					%	
Invesco FTSE RAFI US 1500 Small-Mid Portfolio					%	
Invesco Small Cap Growth Portfolio					%	
Invesco International Growth Portfolio					%	
Invesco FTSE RAFI Developed Markets ex-U.S. Portfolio					%	
Invesco Equity and Income Portfolio					%	
Invesco Global Sustainable Equity Portfolio					%	
	Total	1	0	0	%	

DO NOT STAPLE

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 is funded with UGMA/UTMA assets, I further certify that I am the parent/guthe request is in the best interest of the Beneficiary.	0 1
SIGNATURE Signature of Account Owner	





