


CollegeBound 529

# Investment Option Change/Future Contribution Allocation Form


## CollegeBound 529

- 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**

### 1. Account information

-

Account Number

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

-    -

Telephone Number (*In case we have a question about your Account.*)

Name of Beneficiary (*first, middle initial, last*)



## 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](http://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

All		Percentage
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %

<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %

<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="checkbox"/> <input type="checkbox"/> %

### Investment Option

#### Age-Based Portfolios

- Invesco CollegeBound Today Portfolio
- Invesco CollegeBound 2023-2024 Portfolio
- Invesco CollegeBound 2025-2026 Portfolio
- Invesco CollegeBound 2027-2028 Portfolio
- Invesco CollegeBound 2029-2030 Portfolio
- Invesco CollegeBound 2031-2032 Portfolio
- Invesco CollegeBound 2033-2034 Portfolio
- Invesco CollegeBound 2035-2036 Portfolio
- Invesco CollegeBound 2037-2038 Portfolio
- Invesco CollegeBound 2039-2040 Portfolio
- Invesco CollegeBound 2041-2042 Portfolio

#### Target Risk Portfolios:

- Invesco Conservative College Portfolio
- Invesco Moderate College Portfolio
- Invesco Growth College Portfolio
- Invesco Aggressive College Portfolio

#### Individual Portfolios:

- Invesco Stable Value Portfolio
- Invesco Core Bond Portfolio
- Invesco Short Duration Inflation Protected Portfolio
- Invesco Equally-Weighted S&P 500 Portfolio
- Invesco Diversified Dividend Portfolio
- Invesco Core Plus Bond Portfolio
- Invesco Fundamental High Yield Corporate Bond Portfolio
- Invesco Global Real Estate Income Portfolio
- Invesco S&P 500 Low Volatility Portfolio
- Invesco American Franchise Portfolio
- Invesco NASDAQ 100 Index Portfolio
- Invesco Oppenheimer International Growth Portfolio
- Invesco Discovery Mid Cap Growth Portfolio
- Invesco Main Street Small Cap Portfolio
- Invesco Small Cap Value Portfolio
- Invesco Global Focus Portfolio
- Invesco Developing Markets Portfolio
- Invesco Small Cap Growth Portfolio
- Invesco Equity and Income Portfolio
- Invesco MSCI World SRI Index Portfolio

### Exchange TO

<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%

<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%

<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	%

**Total**    %

**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 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"/>	%
Invesco CollegeBound 2039-2040 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco CollegeBound 2041-2042 Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%

**Please select only one Unit Class:**

Class A

Class C

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"/>	%
Invesco Aggressive College Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%

**Individual Portfolios:**

Invesco Stable Value Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Core Bond 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 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 Core Plus Bond Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Fundamental High Yield Corporate Bond Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Global Real Estate Income Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco S&P Low Volatility Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco American Franchise Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco NASDAQ 100 Index Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Oppenheimer International Growth Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Discovery Mid Cap Growth Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Main Street Small Cap Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Small Cap Value Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Global Focus Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco Developing Markets 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 Equity and Income Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Invesco MSCI World SRI Index Portfolio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%

**Total**       1    0    0   %

#### 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

