

DO NOT STAPLE

Brighter Future Advisor Plan Dollar Cost Averaging Program Form



- Complete this form if you want to regularly transfer a fixed-dollar amount from one designated investment option in the Brighter Future Advisor Plan (Source Investment Option) to one or more other investment options on regular basis.
- By selecting this feature, you authorize the Brighter Future Advisor Plan to exchange money automatically from one Source Investment Option to one or more other investment options in the Brighter Future Advisor Plan either monthly or quarterly. The minimum exchange amount is \$200. The minimum balance in the Source Investment Option portfolio must be \$2400 in order to implement this program.

Note: If the Dollar Cost Averaging Program is established at the time a new Account is opened, it will not count as one of your two allowable investment exchanges per calendar year. However, if you make any changes to your Dollar Cost Averaging Program selections or terminate your Dollar Cost Averaging Program, that will count as one of your two allowable investment exchanges per calendar year. Establishing a Dollar Cost Averaging Program when you make a new investment to an existing investment option that has already been established for your Account or implementing a Dollar Cost Averaging Program to existing Account assets will count as one of your two allowable investment exchanges per calendar year.

Forms can be downloaded from our website at **www.BrighterFutureAdvisor529.com**, or you can call us to order any form—or request assistance in completing this form at **1.888.529.9552** any business day from 8:30 a.m. to 6:30 p.m. ET.

Mail this form and any other required documents to:

Brighter Future Advisor Plan
P.O. Box 219700
Kansas City, MO 64121-9700

For overnight delivery or registered mail, send to:

Brighter Future Advisor Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

1. Account Information

Account Number

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



2. Frequency: (Check one.) Monthly Quarterly*

* Based upon established date, not a calendar quarter.

Start Date:** - -
Date (mm/dd/yyyy)

End Date:** - -
Date (mm/dd/yyyy)

** The Brighter Future Advisor Plan must receive instructions at least 3 business days prior to the indicated start date. Please review your quarterly statements for details of these transactions. If the start date is not specified, the Dollar Cost Averaging Program will begin the month following the receipt of this request, on the 10th day of the month, and continue until the specified end date, until otherwise instructed, or until funds in the Source Investment Option Portfolio are depleted.

I authorize the Brighter Future Advisor Plan to exchange from the following Source Investment Option:

Source Investment Option

\$, .
Amount***

To the following Investment Option(s)

Investment Option

\$, .
Amount***

Investment Option

\$, .
Amount***

Investment Option

\$, .
Amount***

Investment Option

\$, .
Amount***

*** Please specify only dollar amounts, not percentages

3. Signature — YOU MUST SIGN BELOW

I authorize the regular exchange of assets in my account as directed above from the Source Investment Option identified above to the investments option(s) selected above in the Dollar Cost Averaging Program. I certify that I have read and understand, consent and agree to all the terms and conditions of the Brighter Future Advisor Plan Program Description and Participation Agreement. I certify that I have read and understand, consent and agree to all the terms and conditions of the Brighter Future Advisor Plan Program Description and Participation Agreement.

SIGNATURE
Signature of Account Owner

- -
Date (mm/dd/yyyy)