DO NOT STAPLE

Brighter Future Advisor Plan

Exchange / Future Contribution (Allocation) Form for Clients of Broker Dealer Representatives

BRIGHTER FUTURE
529 ADVISOR PLAN

- Complete this form along with your financial advisor to exchange existing assets to a new investment option (**Section 2**) or to change your allocation instructions for future contributions (**Section 3**). Clients of Broker Dealer Representatives should use this form. If you are a client of a Registered Investment Advisor ("RIA"), please use the Exchange Form for Clients of Registered Investment Advisors.
- You can also exchange existing assets or change your future contributions online at **www.BrighterFutureAdvisor529.com**.
- Print clearly, preferably in capital letters and black ink.

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)*

☐☐☐ – ☐☐☐ – ☐☐☐☐
Daytime Telephone Number

☐☐☐ – ☐☐☐ – ☐☐☐☐
Evening Telephone Number

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

AR ADV BRKR DLR EXCHANGE

2. Exchange Instructions For Existing Assets

- For each investment option you hold and wish to exchange, tell us the percentage of assets you want moved and where you want the assets invested. *(You must allocate at least **1%** of your exchange amount to each investment option that you choose. Use whole percentages only.)*
- See the Brighter Future Advisor Plan Program Description (available at **www.BrighterFutureAdvisor529.com**) for complete information on the investment options you are considering.
- **Remember:** Federal law allows account owners to make two investment exchanges 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*		Exchange FROM: *Percentage*	Investment Option	Exchange TO
			Year-of-Enrollment Portfolios	
☐	OR	%	iShares College Portfolio	%
☐	OR	%	iShares 2024 College Portfolio	%
☐	OR	%	iShares 2027 College Portfolio	%
☐	OR	%	iShares 2030 College Portfolio	%
☐	OR	%	iShares 2033 College Portfolio	%
☐	OR	%	iShares 2036 College Portfolio	%
☐	OR	%	iShares 2039 College Portfolio	%
			Asset Allocation Portfolios	
☐	OR	%	iShares Aggressive Portfolio	%
☐	OR	%	iShares Moderate Portfolio	%
☐	OR	%	iShares Conservative Portfolio	%
☐	OR	%	iShares Fixed Income Portfolio	%
			Custom iShares Portfolios	
☐	OR	%	iShares Russell 1000 Portfolio	%
☐	OR	%	iShares Russell 2000 Portfolio	%
☐	OR	%	iShares Core S&P Total U.S. Stock Market Portfolio	%
☐	OR	%	iShares Core High Dividend Portfolio	%
☐	OR	%	iShares Core U.S. REIT Portfolio	%
☐	OR	%	iShares Core MSCI EAFE Portfolio	%
☐	OR	%	iShares Core MSCI Emerging Markets Portfolio	%
☐	OR	%	iShares Edge MSCI Min Vol EAFE Portfolio	%
☐	OR	%	iShares Edge MSCI Min Vol Emerging Markets Portfolio	%
☐	OR	%	iShares Core MSCI Total International Stock Portfolio	%
☐	OR	%	iShares Core U.S. Aggregate Bond Portfolio	%
☐	OR	%	iShares TIPS Bond Portfolio	%
☐	OR	%	iShares 20+ Year Treasury Bond Portfolio	%
☐	OR	%	iShares Short Treasury Bond Portfolio	%
☐	OR	%	iShares 1-5 Year Investment Grade Corp Bond Portfolio	%
☐	OR	%	iShares iBoxx $ Investment Grade Corporate Bond Portfolio	%
☐	OR	%	iShares iBoxx $ High Yield Corporate Bond Portfolio	%
			Savings Portfolio	
☐	OR	%	Savings Portfolio	%
			TOTAL	100 %

3. Allocation Instructions for Future Contributions

- Your future contributions, which can be updated at any time, will be invested in the investment options you select until you change them.
- Before choosing your investment option, see the Brighter Future Advisor Plan Program Description (available at **www.BrighterFutureAdvisor529.com**) for complete information about the investment options offered.
- You must allocate at least **1%** of your contributions to each investment option that you choose. Use whole percentages only.
- Choose from Share Class A or Share Class L options

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

Select Share Class
(Required)

Class A ☐

Class L ☐

	Percentage
Year-of-Enrollment Portfolios:	
iShares College Portfolio	☐☐☐%
iShares 2024 College Portfolio	☐☐☐%
iShares 2027 College Portfolio	☐☐☐%
iShares 2030 College Portfolio	☐☐☐%
iShares 2033 College Portfolio	☐☐☐%
iShares 2036 College Portfolio	☐☐☐%
iShares 2039 College Portfolio	☐☐☐%
Asset Allocation Portfolios:	
iShares Aggressive Portfolio	☐☐☐%
iShares Moderate Portfolio	☐☐☐%
iShares Conservative Portfolio	☐☐☐%
iShares Fixed Income Portfolio	☐☐☐%
Custom iShares Portfolios:	
iShares Russell 1000 Portfolio	☐☐☐%
iShares Russell 2000 Portfolio	☐☐☐%
iShares Core S&P Total U.S. Stock Market Portfolio	☐☐☐%
iShares Core High Dividend Portfolio	☐☐☐%
iShares Core U.S. REIT Portfolio	☐☐☐%
iShares Core MSCI EAFE Portfolio	☐☐☐%
iShares Core MSCI Emerging Markets Portfolio	☐☐☐%
iShares Edge MSCI Min Vol EAFE Portfolio	☐☐☐%
iShares Edge MSCI Min Vol Emerging Markets Portfolio	☐☐☐%
iShares Core MSCI Total International Stock Portfolio	☐☐☐%
iShares Core U.S. Aggregate Bond	☐☐☐%
iShares TIPS Bond Portfolio	☐☐☐%
iShares 20+ Year Treasury Bond Portfolio	☐☐☐%
iShares Short Treasury Bond Portfolio	☐☐☐%
iShares 1-5 Year Investment Grade Corp Bond Portfolio	☐☐☐%
iShares iBoxx $ Investment Grade Corporate Bond Portfolio	☐☐☐%
iShares iBoxx $ High Yield Corporate Bond Portfolio	☐☐☐%
Savings Portfolio	
Savings Portfolio	☐☐☐%
TOTAL	1 0 0 %

4. Signature — YOU MUST SIGN BELOW

I authorize the exchange of assets in my account to the investment option(s) I selected in **Section 2** and/or the allocation of my future contributions to the investment option(s) I selected in **Section 3**. 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

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Date *(mm/dd/yyyy)*