

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		Investment Option	Exchange TO
<input type="checkbox"/> All		Year-of-Enrollment Portfolios	
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 2024 College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 2027 College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 2030 College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 2033 College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 2036 College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 2039 College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	Asset Allocation Portfolios	
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Aggressive Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Moderate Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Conservative Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Fixed Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	Custom iShares Portfolios	
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Russell 1000 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Russell 2000 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Core S&P Total U.S. Stock Market Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Core High Dividend Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Core U.S. REIT Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Core MSCI EAFE Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Core MSCI Emerging Markets Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Edge MSCI Min Vol EAFE Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Edge MSCI Min Vol Emerging Markets Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Core MSCI Total International Stock Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Core U.S. Aggregate Bond Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares TIPS Bond Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 20+ Year Treasury Bond Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares Short Treasury Bond Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares 1-5 Year Investment Grade Corp Bond Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares iBoxx \$ Investment Grade Corporate Bond Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	iShares iBoxx \$ High Yield Corporate Bond Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	Savings Portfolio	
<input type="checkbox"/> OR	<input type="text"/> <input type="text"/> %	Savings Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
TOTAL			1 0 0 %

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.

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

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.

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Signature of Account Owner

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Date (mm/dd/yyyy)