

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 5% of your exchange amount to each investment option that you choose. Use whole percentages only. Choose up to 5 of the 10 investment options.)*
- See the GIFT Plan Program Description *(available at www.thegiftplan.com)* for complete information on the investment options you are considering.

Remember: Federal law allows Account Owners to make two 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
<i>All</i>	<i>Percentage</i>	Age-Based Options	
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Aggressive Age-Based Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Moderate Age-Based Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Conservative Age-Based Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Custom Portfolio Options	
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Aggressive Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Moderate Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Conservative Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Income Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	Interest Accumulation Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		GIFT Plan Savings Portfolio Option	
<input type="checkbox"/>	OR <input type="checkbox"/> <input type="checkbox"/> %	GIFT Plan Savings Portfolio <i>(FDIC-Insured)</i>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
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 GIFT Plan Program Description (*available at www.thegiftplan.com*) for complete information about the investment options offered.
- You must allocate at least **5%** of your contributions to each investment option that you choose. Use whole percentages only. Choose up to **5** of the **10** investment options.

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

Age-Based Options:

Aggressive Age-Based Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderate Age-Based Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Age-Based Option	<input type="text"/> <input type="text"/> <input type="text"/> %

Custom Portfolio Options:

Aggressive Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderate Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Interest Accumulation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

GIFT Plan Savings Portfolio Option:

GIFT Plan Savings Portfolio <i>(FDIC-Insured)</i>	<input type="text"/> <input type="text"/> <input type="text"/> %
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TOTAL %

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 GIFT Plan Program Description and Participation Agreement.

Signature of Account Owner

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Date (mm/dd/yyyy)

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