

**DO NOT STAPLE**



Arkansas Brighter Future Direct Plan  
**Exchange/Future Contribution (Allocation) Form**

- Complete this form to exchange existing assets to a new investment option in **Section 2** or to change your allocation instructions for future contributions in **Section 3**.
- You can also exchange existing assets or change your future contributions online at **www.BrighterFutureDirect529.com**.
- Print clearly, preferably in capital letters and black ink.

Forms can be downloaded from our website at **www.BrighterFutureDirect529.com**, or you can call us to order any form—or request assistance in completing this form at **1.800.587.7301** any business day from 9 a.m. to 8 p.m. Eastern time.

Return this form and any other required documents in the enclosed postage-paid envelope, or mail to:

**Arkansas Brighter Future Direct Plan**  
**P.O. Box 219376**  
**Kansas City, MO 64121-9376**

For overnight delivery or registered mail, send to:

**Arkansas Brighter Future Direct Plan**  
**1001 E 101st Terrace, Suite 200**  
**Kansas City, MO 64131**

**1. Account information**

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Account Number

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

—    —

Daytime Telephone Number

—    —

Evening Telephone Number

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



## 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.
- See the Arkansas Brighter Future Direct Plan Program Description (available at [www.BrighterFutureDirect529.com](http://www.BrighterFutureDirect529.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>		<b>Target Enrollment Portfolio *</b>	
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2042/2043	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2040/2041	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2038/2039	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2036/2037	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2034/2035	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2032/2033	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2030/2031	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2028/2029	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2026/2027	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2024/2025	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Target Enrollment 2022/2023	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Commencement Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
		<b>Fixed Asset Allocation Portfolios **</b>	
<input type="checkbox"/>	<b>OR</b>	Aggressive Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Moderate Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Conservative Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	Interest Accumulation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
		<b>Savings Portfolio ***</b>	
<input type="checkbox"/>	<b>OR</b>	Savings Portfolio (FDIC-Insured)	<input type="text"/> <input type="text"/> <input type="text"/> %
			<b>TOTAL</b> <input type="text"/> <input type="text"/> <input type="text"/> %

\* The asset allocation of money invested in the Target Enrollment Portfolios automatically becomes more conservative as the beneficiary nears the target enrollment year.

\*\* The assets will remain in the portfolio you select until you exchange them into a new investment option.

\*\*\* The assets will remain in the Savings Portfolio until you exchange them into a new investment option.

### 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 Arkansas Brighter Future Direct Plan Program Description (available at [www.BrighterFutureDirect529.com](http://www.BrighterFutureDirect529.com)) for complete information about the investment options offered.

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

#### Target Enrollment Portfolio:

Your investment mix automatically becomes more conservative as the beneficiary nears the target enrollment year.

Target Enrollment 2042/2043	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2040/2041	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2038/2039	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2036/2037	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2034/2035	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2032/2033	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2030/2031	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2028/2029	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2026/2027	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2024/2025	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2022/2023	<input type="text"/> <input type="text"/> <input type="text"/>	%
Commencement Portfolio	<input type="text"/> <input type="text"/> <input type="text"/>	%

#### Please remember to:

- Choose one or more investment options for your account
- Allocate at least 1% to each investment you choose.
- Use whole numbers.

#### Fixed Asset Allocation Portfolios:

The assets will remain in the portfolio you select until you exchange them into a new investment option.

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"/>	%

#### Savings Portfolio:

The assets will remain in the Savings Portfolio until you exchange them into a new investment option.

Savings Portfolio (FDIC-Insured)	<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 Arkansas Brighter Future Direct Plan Program Description and Participation Agreement.

SIGNATURE \_\_\_\_\_

Signature of Account Owner

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

Date (mm/dd/yyyy)

DO NOT STAPLE

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