



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 920 Main Street, Suite 900 Kansas City, MO 64105
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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)



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 Arkansas Brighter Future Direct Plan Program Description (available at 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>	<i>Percentage</i>	Age-Based Options	
<input type="checkbox"/>	OR <input type="checkbox"/>	Aggressive Age-Based Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/>	Moderate Age-Based Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <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"/>	Aggressive Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/>	Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/>	Moderate Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/>	Conservative Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/>	Income Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR <input type="checkbox"/>	Interest Accumulation Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Savings Portfolio Option	
<input type="checkbox"/>	OR <input type="checkbox"/>	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 Arkansas Brighter Future Direct Plan Program Description (available at www.BrighterFutureDirect529.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"/> %

Savings Portfolio 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

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Date (mm/dd/yyyy)

DO NOT STAPLE

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