## DO NOT STAPLE

HI529 — Hawaii's College Savings Program

# Exchange / Future Contribution (Allocation) Form



- You can also exchange existing assets or change your future contributions online at www.hi529.com.
- Complete Section 2 to exchange existing assets to a new investment option. (You can do this twice per calendar year.)
- Complete Section 3 to change your allocation instructions for future contributions. (You can do this as often as you wish.)
- Print clearly, preferably in capital letters and black ink.

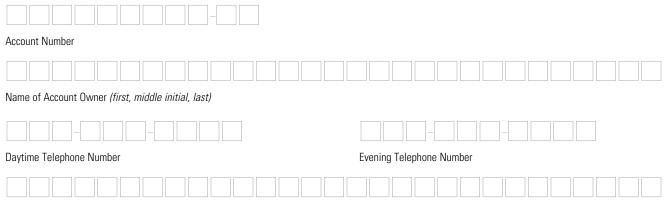
Forms can be downloaded from our website at **www.hi529.com**, or you can call us to order any form – or request assistance in completing this form at **1.866.529.3343** any business day from 8:00 a.m. to 5:00 p.m. (Hawaii Standard Time).

Return this form in the enclosed postage-paid envelope, or mail to:

HI529— Hawaii's College Savings Program P.O. Box 219779 Kansas City, MO 64121-9779 For overnight delivery or registered mail, send to:

HI529—Hawaii's College Savings Program 1001 E 101st Terrace, Suite 200 Kansas City, MO 64131

# **Account Information**



Name of Beneficiary (first, middle initial, last)



TOTAL

1

0 0 %

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# 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.)
- See the HI529 Plan Disclosure Statement (available at www.hi529.com) for complete information on the investment options you are considering.
- Important: You may choose no more than five (5) investment options for your account.
- **<u>Remember</u>**: 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 change the allocation of your future contributions.

Exchange FROM			Investment Option	Exchange TO	
All	P	ercentage	Age-Based Option *		
0	R	%	Age-Based Option	%	
			Fixed Asset Allocation Portfolios **		
0	R	%	Vanguard Growth Portfolio	%	
0	R	%	Vanguard Moderate Growth Portfolio	%	
0	R	%	Vanguard Conservative Growth Portfolio	%	
0	R	%	Vanguard Income Portfolio	%	
0	R	%	Vanguard Total International Stock Index Portfolio	%	
0	R	%	Vanguard Total Stock Market Index Portfolio	%	
0	R	%	Vanguard Total Bond Market Index Portfolio	%	
0	R	%	Vanguard Money Market Portfolio	%	

The asset allocation of money invested in the Age-Based Option is automatically adjusted over time to become more conservative as the beneficiary approaches college age.

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

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# 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 HI529 Disclosure Statement (available at **www.hi529.com**) for complete information about the investment options offered.
- You may allocate your contribution among a maximum of five (5) investment options.
- You must allocate at least 5% of your contributions to each investment option that you choose. Use whole percentages only.
- You can invest your contributions in the Age-Based Option, Fixed Asset Allocation Portfolios, or a combination of these. Refer to the HI529 Plan Disclosure Statement for more information.

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

### **Age-Based Option:**

The asset allocation of money invested in the Age-Based Option is automatically adjusted over time to become more conservative as the beneficiary approaches college age.

Age-Based Option

## **Fixed Asset Allocation Portfolios:**

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

Vanguard Growth Portfolio			%
Vanguard Moderate Growth Portfolio			%
Vanguard Conservative Growth Portfolio			%
Vanguard Income Portfolio			%
Vanguard Total International Stock Index Portfolio			%
Vanguard Total Stock Market Index Portfolio			%
Vanguard Total Bond Market Index Portfolio			%
Vanguard Money Market Portfolio			%
	-		
	TOTAL	1 0	0 %

# 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 HI529 Plan Disclosure Statement and Participation Agreement.



Signature of Account Owner

Date (mm/dd/yyyy)

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