

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
920 Main Street, Suite 900
Kansas City, MO 64105

1. Account Information

Account Number

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

Daytime Telephone Number

Evening Telephone Number

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



* H I E X C H *

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.
- **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 change the allocation of your future contributions.

| Exchange FROM | | Investment Option | Exchange TO |
|--------------------------|-----------|--|---|
| <i>All</i> | | Age-Based Option * | |
| <input type="checkbox"/> | OR | <i>Percentage</i> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| | | Age-Based Option | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Fixed Asset Allocation Portfolios ** | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Growth Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Moderate Growth Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Conservative Growth Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Income Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Total International Stock Index Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Total Stock Market Index Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Total Bond Market Index Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> | OR | Vanguard Money Market Portfolio | <input type="text"/> <input type="text"/> <input type="text"/> % |
| | | | TOTAL <input type="text"/> <input type="text"/> <input type="text"/> % |

* 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.

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 %

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 HI529 Plan Disclosure Statement and Participation Agreement.

SIGNATURE

Signature of Account Owner

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Date (mm/dd/yyyy)

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