

Exchange/Future Contribution (Allocation) Form

- Forms can be downloaded from our website at **ISave529.com**, or you can call us to order any form—or request assistance in completing this form—at **888-672-9116** on business days from 7 a.m. - 8 p.m. Central Time.

ISave 529
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

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

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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 reinvested. (You must allocate at least 5% of your exchange amount to each investment that you choose, using whole percentages only.)
- Important:** You may choose up to five investment options.
- For more information about the investment options, refer to the ISave 529 Program Description (available at ISave529.com) or call us at **888-672-9116**.
- Your investment percentages must total 100%.

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

Exchange FROM

(Check "All" or indicate the percentage of your **current investment** that you want to move to a new investment.)

All Percentage

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

Investment Option

Age-Based Savings Tracks— Designed for Higher Education

Aggressive Growth Age-Based Track

Growth Age-Based Track

Moderate Growth Age-Based Track

Conservative Growth Age-Based Track

Exchange TO

(Indicate the percentage of your total exchange that you want invested in each option.)

☐ ☐ ☐ %

☐ ☐ ☐ %

☐ ☐ ☐ %

☐ ☐ ☐ %

Individual Portfolios

Stock Portfolios:

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

Total International Stock Index Portfolio

Aggressive Growth Portfolio

Total Domestic Stock Index Portfolio

☐ ☐ ☐ %

☐ ☐ ☐ %

☐ ☐ ☐ %

Balanced Portfolios:

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

Growth Portfolio

Moderate Growth Portfolio

Conservative Growth Portfolio

Income Portfolio

☐ ☐ ☐ %

☐ ☐ ☐ %

☐ ☐ ☐ %

☐ ☐ ☐ %

Bond Portfolios:

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

☐ **OR** ☐ ☐ %

Short-Term Bond Index Portfolio

Bond Index Portfolio

Conservative Income Portfolio

Total International Bond Index Portfolio

☐ ☐ ☐ %

☐ ☐ ☐ %

☐ ☐ ☐ %

☐ ☐ ☐ %

Short-Term Reserve Portfolio:

☐ **OR** ☐ ☐ %

Interest Accumulation Portfolio

☐ ☐ ☐ %

TOTAL

☐ ☐ ☐ %

3. Allocation Instructions for Future Contributions

- Complete this section to change how your future contributions will be invested.
- You can invest your contributions in Age-Based Savings Tracks designed for saving for higher-education expenses, in Individual Portfolios or in a combination of these. Refer to the ISave 529 Program Description for more information.
- You may **choose up to five investment options**. You must **allocate at least 5%** of your contributions to each investment that you choose, using whole percentages only.
- Your investment percentages must total 100%.
- Your allocation instructions will remain in effect until you change them online at **ISave529.com** or submit a new Exchange/Future Contribution (Allocation) Form.

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

Age-Based Savings Tracks—Designed for Higher Education *(Each track invests in a series of Individual Portfolios. The assets in an Age-Based Savings Tracks will be automatically exchanged from one portfolio to another as the Beneficiary ages.)*

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

Individual Portfolios *(The assets will remain in the portfolio you select until you exchange them to a new investment option.)*

Stock Portfolios:

Total International Stock Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Aggressive Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Total Domestic Stock Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

Balanced Portfolios:

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"/> %

Bond Portfolios:

Short-Term Bond Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Bond Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Total International Bond Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

Short-Term Reserve Portfolios:

Interest Accumulation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
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Total %

Please remember to:

- Choose no more than five investments.
- Allocate at least 5% to each investment you choose.
- Use whole numbers.
- Sign in **Section 4**.

4. Authorization - YOU MUST SIGN BELOW

I authorize the exchange of assets in my account to the investments I selected in **Section 2** and/or the allocation of my future contributions to the investments I selected in **Section 3**. I certify that I have received and read the ISave 529 Program Description and understand the rules and regulations governing ISave 529.

➤

SIGNATURE

Signature of Account Owner

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Date (mm-dd-yyyy)