

College Savings Iowa[®]

Exchange/Future Contribution (Allocation) Form

- You can easily exchange existing assets or change your future contribution allocations online at **CollegeSavingsIowa.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.
- Print clearly, preferably in capital letters and black ink.

Forms can be downloaded from our website at **CollegeSavingsIowa.com**. Or you can call us toll-free to order any form—or get assistance in filling out this one—at **888-672-9116** on business days from 8 a.m. to 9 p.m., Eastern time. Return this form in the enclosed postage-paid envelope, or mail to: **College Savings Iowa, P.O. Box 219219, Kansas City, MO 64121-9219**. For overnight delivery or registered mail, send to: **College Savings Iowa, 1001 E 101st Terrace, Suite 200, Kansas City, MO 64131**.

1. Account Information

Account Number

Name of Participant *(first, middle initial, last)*
 - -

Daytime Phone Number

 - -

Evening Phone Number

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

REMEMBER TO SIGN IN SECTION 4.



ALLOCATION EXCHANGE FORM

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 College Savings Iowa Program Description (available at CollegeSavingsIowa.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
<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %

<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %

<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %

<input type="checkbox"/>	OR <input type="text"/> %
<input type="checkbox"/>	OR <input type="text"/> %

<input type="checkbox"/>	OR <input type="text"/> %
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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

Individual Portfolios

Stock Portfolios:

- Total International Stock Index Portfolio
- Aggressive Growth Portfolio
- Total Domestic Stock Index Portfolio

Balanced Portfolios:

- Growth Portfolio
- Moderate Growth Portfolio
- Conservative Growth Portfolio
- Income Portfolio

Bond Portfolios:

- Bond Index Portfolio
- Conservative Income Portfolio

Short-Term Reserve Portfolio:

- Interest Accumulation Portfolio

Exchange TO

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

<input type="text"/> %
<input type="text"/> %
<input type="text"/> %
<input type="text"/> %

<input type="text"/> %
<input type="text"/> %
<input type="text"/> %

<input type="text"/> %
<input type="text"/> %
<input type="text"/> %
<input type="text"/> %

<input type="text"/> %
<input type="text"/> %

<input type="text"/> %

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 College Savings Iowa 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 **CollegeSavingsIowa.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 track will be automatically exchanged from one portfolio to another as the beneficiary ages.)*

Aggressive Growth Age-Based Track	<input type="text"/> %
Growth Age-Based Track	<input type="text"/> %
Moderate Growth Age-Based Track	<input type="text"/> %
Conservative Growth Age-Based Track	<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"/> %
Aggressive Growth Portfolio	<input type="text"/> %
Total Domestic Stock Index Portfolio	<input type="text"/> %

Balanced Portfolios:

Growth Portfolio	<input type="text"/> %
Moderate Growth Portfolio	<input type="text"/> %
Conservative Growth Portfolio	<input type="text"/> %
Income Portfolio	<input type="text"/> %

Bond Portfolios:

Bond Index Portfolio	<input type="text"/> %
Conservative Income Portfolio	<input type="text"/> %

Short-Term Reserve Portfolio:

Interest Accumulation Portfolio	<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 College Savings Iowa Program Description and understand the rules and regulations governing College Savings Iowa.

▶

Signature of Participant

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Date (month, day, year)