

# Ideal – Idaho College Savings Program

## Exchange / Future Contribution (Allocation) Form



- You can also exchange existing assets or change your future contributions online at [www.idsave.org](http://www.idsave.org).
- 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. Do not staple.

Forms can be downloaded from our website at [www.idsave.org](http://www.idsave.org), or you can call us to request any form – or for assistance in completing this form – at **1.866.433.2533** any business day from 6 a.m. to 6 p.m., Mountain Time.

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

**Ideal – Idaho College Savings Program**  
**P.O. Box 219944**  
**Kansas City, MO 64121**

For overnight delivery or registered mail, send to:

**Ideal – Idaho College Savings Program**  
**1001 E 101st Terrace, Suite 200**  
**Kansas City, MO 64131**

### 1. Account information

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Account Number

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

–    –

Daytime Telephone Number

–    –

Evening Telephone Number

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



\* I D E X C H A N G E \*

## 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 Disclosure Statement (available at [www.idsave.org](http://www.idsave.org)) for complete information on the investment options you are considering.
- **Important:** You may choose no more than **five** 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 affect the allocation of your future investments.**

Exchange FROM		Investment Option	Exchange TO
<i>All</i>	<i>Percentage</i>	<b>Target Enrollment Portfolio *</b>	
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2042/2043	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2040/2041	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2038/2039	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2036/2037	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2034/2035	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2032/2033	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2030/2031	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2028/2029	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2026/2027	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2024/2025	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Target Enrollment 2022/2023	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Commencement Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		<b>Fixed Asset Allocation Portfolios **</b>	
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Aggressive Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Moderate Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Conservative Growth Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Income Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Interest Accumulation Portfolio	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		<b>Savings Portfolio ***</b>	
<input type="checkbox"/>	<b>OR</b> <input type="checkbox"/> <input type="checkbox"/> %	Savings Portfolio <i>(FDIC-Insured)</i>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<b>TOTAL</b>			<b>1 0 0 %</b>

\* The asset allocation of money invested in the Target Enrollment Portfolios automatically becomes more conservative as the beneficiary nears the target enrollment year.

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

\*\*\* The assets will remain in the Savings Portfolio 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 Disclosure Statement (available at [www.idsaves.org](http://www.idsaves.org)) for complete information about the investment options offered.
- You may allocate your contribution among a maximum of **five** investment options.
- You must allocate at least **5%** of your contributions to each investment option that you choose. Use whole percentages only.

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

#### Target Enrollment Portfolio:

Your investment mix automatically becomes more conservative as the beneficiary nears the target enrollment year.

Target Enrollment 2042/2043	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2040/2041	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2038/2039	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2036/2037	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2034/2035	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2032/2033	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2030/2031	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2028/2029	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2026/2027	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2024/2025	<input type="text"/> <input type="text"/> <input type="text"/>	%
Target Enrollment 2022/2023	<input type="text"/> <input type="text"/> <input type="text"/>	%
Commencement Portfolio	<input type="text"/> <input type="text"/> <input type="text"/>	%

#### Please remember to:

- Choose no more than five investment options for your account.
- Allocate at least 5% to each investment you choose.
- Use whole numbers.

#### Fixed Asset Allocation Portfolios:

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

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:

The assets will remain in the Savings Portfolio until you exchange them into a new investment 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 Disclosure Statement and Participation Agreement.

➤  Signature of Account Owner

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Date (mm/dd/yyyy)