

Idéal – Idaho College Savings Program Exchange / Future Contribution (Allocation) Form



- You can also exchange existing assets or change your future contributions online at www.idsaves.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.idsaves.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 8 a.m. to 8 p.m. Eastern time.

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

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

For overnight delivery or registered mail, send to:

Idéal – Idaho 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*)



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.idsaves.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>		Age-Based Options *	
<input type="checkbox"/>	OR	Aggressive Age-Based Option	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Moderate Age-Based Option	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Conservative Age-Based Option	<input type="text"/> <input type="text"/> <input type="text"/> %
		Fixed Asset Allocation Portfolios **	
<input type="checkbox"/>	OR	Aggressive Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Moderate Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Conservative Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Interest Accumulation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
		Savings Portfolio ***	
<input type="checkbox"/>	OR	Savings Portfolio <i>(FDIC-Insured)</i>	<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 Options 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.

*** 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.idsave.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.

Age-Based Options:

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

Aggressive Age-Based Option %

Moderate Age-Based Option %

Conservative 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.

Aggressive Growth Portfolio %

Growth Portfolio %

Moderate Growth Portfolio %

Conservative Growth Portfolio %

Income Portfolio %

Interest Accumulation Portfolio %

Savings Portfolio:

Savings Portfolio %
(FDIC-Insured)

TOTAL %

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.

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.

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Signature of Account Owner

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Date (mm/dd/yyyy)