

CollegeChoice Advisor 529 Savings Plan
Exchange/Future
Contribution "Allocation" Form

CollegeChoiceAdvisor
529 SAVINGS PLAN

- You can exchange existing assets or change your future contributions by telephone or online at www.collegechoiceadvisor529.com.
• Complete Section 2 to exchange existing assets to a new Investment Option. (You can do this only twice per calendar year.)
• Complete Section 3 to change your allocation instructions for future contributions.
• Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address below. Do not staple.

Forms can be downloaded from our website at www.collegechoiceadvisor529.com, or you can call us to order any form—or request assistance in completing this form—at 1.866.485.9413 any business day from 8 a.m. to 8 p.m. Eastern time.

Return this form and any other required documents to:

CollegeChoice Advisor 529 Savings Plan
P.O. Box 219354
Kansas City, MO 64121

For overnight delivery or registered mail, send to:

CollegeChoice Advisor 529 Savings Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

1. Account information

Account Number input boxes

Account Number

Name of Account Owner input boxes

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

Telephone Number input boxes

Telephone Number

Name of Beneficiary input boxes

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.
- See the CollegeChoice Advisor 529 Savings Plan Disclosure Statement (“Disclosure Statement”) (*available at [www.collegechoiceadvisor529.com](http://www.collegechoiceadvisor529.com)*) for complete information on the Investment Options you are considering.

**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>Year of Enrollment Portfolios*</b>	
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	2025 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	2028 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	2031 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	2034 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	2037 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	2040 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
			<b>Individual Portfolios**</b>	
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	TIPS Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Core Bond Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	PIMCO Total Return Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Vanguard Equity Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Large Cap Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	T Rowe Price Large Cap Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Mid Cap Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Diamond Hill Small-Mid Cap Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Small Cap Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	International Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	American Funds EuroPacific Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Emerging Markets Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
			<b>Savings Portfolio and Capital Preservation Portfolio</b>	
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Savings Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	<b>OR</b>	<input type="text"/> <input type="text"/> %	Capital Preservation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
				<input type="text"/> <input type="text"/> <input type="text"/> %

\* The asset allocation of money invested in the Year of Enrollment Portfolios is automatically adjusted over time to become more conservative as the Beneficiary approaches college.

\*\* 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 will be invested in the Investment Options you select until you change them, which can be done at any time.
- Before choosing your Investment Option, see the Disclosure Statement (*available at [www.collegechoiceadvisor529.com](http://www.collegechoiceadvisor529.com)*) for complete information about the Investment Options offered.

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

**Year of Enrollment Portfolios:**

The asset allocation of money invested in the Year of Enrollment Portfolios is automatically adjusted over time to become more conservative as the Beneficiary approaches college.

College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2025 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2028 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2031 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2034 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2037 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2040 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

**Individual Portfolios:**

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

TIPS Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Core Bond Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
PIMCO Total Return Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Equity Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Large Cap Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
T Rowe Price Large Cap Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Mid Cap Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Diamond Hill Small-Mid Cap Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Small Cap Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
International Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
American Funds EuroPacific Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Emerging Markets Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

**Savings Portfolio and Capital Preservation Portfolio:**

The assets will remain in the portfolio until you exchange them into a new Investment Option.

Savings Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Capital Preservation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
	<b>1 0 0</b> %

**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.

Signature of Account Owner

-  -   
Date (mm/dd/yyyy)

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