

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*) 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>	Year of Enrollment Portfolios*	
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2025 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2028 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2031 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2034 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2037 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2040 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2043 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
			Individual Portfolios**	
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	TIPS Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Core Bond Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	PIMCO Total Return Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Vanguard Equity Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Large Cap Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<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"/>	OR	<input type="text"/> <input type="text"/> %	Mid Cap Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Diamond Hill Small-Mid Cap Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Small Cap Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	International Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	American Funds EuroPacific Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<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	
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Savings Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Capital Preservation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
				1 0 0 %

* 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*) 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"/> %
2043 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"/> %
	<hr/>
	1 0 0 %

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

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Date (mm/dd/yyyy)

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