CollegeChoice Advisor 529 Savings Plan

Exchange/Future Contribution "Allocation" Form

CollegeChoice**Advisor**
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
920 Main Street, Suite 900
Kansas City, MO 64105

1. Account information

Account Number

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

Telephone Number

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

IN ADV EXCH

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 *All*		*Percentage*	Investment Option	Exchange TO
			Year of Enrollment Portfolios*	
☐	OR	☐☐ %	College Portfolio	☐☐☐ %
☐	OR	☐☐ %	2022 Enrollment Portfolio	☐☐☐ %
☐	OR	☐☐ %	2025 Enrollment Portfolio	☐☐☐ %
☐	OR	☐☐ %	2028 Enrollment Portfolio	☐☐☐ %
☐	OR	☐☐ %	2031 Enrollment Portfolio	☐☐☐ %
☐	OR	☐☐ %	2034 Enrollment Portfolio	☐☐☐ %
☐	OR	☐☐ %	2037 Enrollment Portfolio	☐☐☐ %
			Individual Portfolios**	
☐	OR	☐☐ %	TIPS Index Portfolio	☐☐☐ %
☐	OR	☐☐ %	Core Bond Index Portfolio	☐☐☐ %
☐	OR	☐☐ %	PIMCO Total Return Portfolio	☐☐☐ %
☐	OR	☐☐ %	Boston Company Dynamic Large Cap Value Portfolio	☐☐☐ %
☐	OR	☐☐ %	Large Cap Index Portfolio	☐☐☐ %
☐	OR	☐☐ %	T. Rowe Price Large Cap Growth Portfolio	☐☐☐ %
☐	OR	☐☐ %	Mid Cap Equity Index Portfolio	☐☐☐ %
☐	OR	☐☐ %	Diamond Hill Small-Mid Portfolio	☐☐☐ %
☐	OR	☐☐ %	Small Cap Equity Index Portfolio	☐☐☐ %
☐	OR	☐☐ %	International Equity Index Portfolio	☐☐☐ %
☐	OR	☐☐ %	American Funds EuroPacific Growth Portfolio	☐☐☐ %
☐	OR	☐☐ %	Emerging Markets Equity Index Portfolio	☐☐☐ %
			Savings Portfolio and Capital Preservation Portfolio	
☐	OR	☐☐ %	Savings Portfolio *(FDIC-Insured)*	☐☐☐ %
☐	OR	☐☐ %	Capital Preservation Portfolio	☐☐☐ %
				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	☐☐☐ %
2022 Enrollment Portfolio	☐☐☐ %
2025 Enrollment Portfolio	☐☐☐ %
2028 Enrollment Portfolio	☐☐☐ %
2031 Enrollment Portfolio	☐☐☐ %
2034 Enrollment Portfolio	☐☐☐ %
2037 Enrollment Portfolio	☐☐☐ %

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

TIPS Index Portfolio	☐☐☐ %
Core Bond Index Portfolio	☐☐☐ %
PIMCO Total Return Portfolio	☐☐☐ %
Boston Company Dynamic Large Cap Value Portfolio	☐☐☐ %
Large Cap Index Portfolio	☐☐☐ %
T. Rowe Price Large Cap Growth Portfolio	☐☐☐ %
Mid Cap Equity Index Portfolio	☐☐☐ %
Diamond Hill Small-Mid Portfolio	☐☐☐ %
Small Cap Equity Index Portfolio	☐☐☐ %
International Equity Index Portfolio	☐☐☐ %
American Funds EuroPacific Growth Portfolio	☐☐☐ %
Emerging Markets Equity Index Portfolio	☐☐☐ %

Savings Portfolio and Capital Preservation Portfolio:
The assets will remain in the portfolio until you exchange them into a new Investment Option.

Savings Portfolio *(FDIC-Insured)*	☐☐☐ %
Capital Preservation Portfolio	☐☐☐ %
	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

Signature of Account Owner

☐☐ – ☐☐ – ☐☐☐☐

Date *(mm/dd/yyyy)*

[PAGE LEFT BLANK INTENTIONALLY]