CollegeChoice 529 Direct Savings Plan

## Exchange/Future Contribution (Allocation) Form



- You can exchange existing assets or change your future contributions by completing this form, by telephone at 1.866.485.9415, or online at www.collegechoicedirect.com.
- 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.
- 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.collegechoicedirect.com**, or you can call us to order any form—or request assistance in completing this form—at **1.866.485.9415** any business day from 8 a.m. to 8 p.m. Eastern time.

Return this form and any other required documents to:

CollegeChoice 529 Direct Savings Plan P.O. Box 219418 Kansas City, MO 64121 For overnight delivery or registered mail, send to:

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

Account information
Account Number
Name of Account Owner (first, middle initial, last)
Telephone Number (In case we have a question about your Account.)
Name of Renoficiary (first middla initial Jast)



## 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 529 Direct Savings Plan Disclosure Booklet (Disclosure Booklet) available at www.collegechoicedirect.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
All	Percentage		Year of Enrollment Portfolios*	
	OR	<b>%</b>	2042 Enrollment Portfolio	
	OR	<b></b> %	2039 Enrollment Portfolio	
	OR	<u></u> %	2036 Enrollment Portfolio	
	OR	<b></b> %	2033 Enrollment Portfolio	
	OR	<u></u> %	2030 Enrollment Portfolio	
	OR	<u></u> %	2027 Enrollment Portfolio	
	OR	<u></u> %	2024 Enrollment Portfolio	
	OR	%	College Portfolio	
			Individual Portfolios**	
	OR	<u></u> %	Active U.S. Equity Portfolio	
	OR	<u></u> %	US Equity Index Portfolio	
	OR	<u></u> %	Active International Equity Portfolio	
	OR	<b>%</b>	International Equity Index Portfolio	
	OR	<b>%</b>	Active Bond Portfolio	%
	OR	<b>%</b>	Bond Index Portfolio	
	OR	%	Inflation-Protected Portfolio	
			Savings Portfolios**	
	OR	<u></u> %	Stable Value Portfolio	%
	OR	<u></u> %	Savings Portfolio	<u> </u>
				100%

<sup>\*</sup> 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 enrollment.

<sup>\*\*</sup> 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, read the Disclosure Booklet available at **www.collegechoicedirect.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.

	ment Portfolios is automatically adjusted over time to become more
conservative as the Beneficiary approaches enrollment.	
2042 Enrollment Portfolio	%
2039 Enrollment Portfolio	%
2036 Enrollment Portfolio	%
2033 Enrollment Portfolio	
2030 Enrollment Portfolio	
2027 Enrollment Portfolio	
2024 Enrollment Portfolio	<b></b>
College Portfolio	<b>\</b>
Individual Portfolios: The assets will remain in the portfolio you select until you ex	xchange them into a new Investment Option.
Active U.S. Equity Portfolio	
US Equity Index Portfolio	
Active International Equity Portfolio	
International Equity Index Portfolio	
Active Bond Portfolio	
Bond Index Portfolio	
Inflation-Protected Portfolio	%
Savings Portfolios: The assets will remain in the portfolio you select until you ex	xchange them into a new Investment
Stable Value Portfolio	<b>\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ </b>
Savings Portfolio	
,	estment Option(s) I selected in <b>Section 2</b> and/or the allocation of my future <b>ion 3</b> . I certify that I have read and understand, consent, and agree to all the
SIGNATURE	
Signature of Account Owner	Date (mm/dd/yyyy)

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