

Learning Quest

Investment Option Change/ Future Allocation Form



- You can change investment options or change your future allocations by completing this form, by telephone at **1-800-579-2203**, or online at **learningquest.com**. Before selecting an investment option, review the Learning Quest Handbook (Handbook) or visit learningquest.com for complete information about the investment options available.
- Complete **Section 2** to move existing assets to a new Investment Option. *(You may change your investment selection 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.

Return this form and any other required documents to: Learning Quest P.O. Box 29202 Shawnee Mission, KS 66201- 9202	Or fax this form to: 1-617-559-8901 Forms can be downloaded from our website at learningquest.com.
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1. Account information

Account Number

Name of Primary Account Owner/Responsible Individual/Custodian *(first, middle initial, last)* or Entity/Trust

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

Telephone Number *(In case we have a question about your Account.)*

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



2. Change instructions for existing assets

- For each Investment Option you hold and wish to change, tell us the percentage of assets you want moved and where you want the assets invested.

Remember: Federal law allows Account Owners to make two portfolio changes 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 contributions. If you want future contributions to be directed to a new portfolio(s), be sure to complete both **Sections 2** and **3**.

Change FROM		Investment Option	Change TO
<i>All</i>		Age-Based Tracks*	
<input type="checkbox"/>	OR	Aggressive Track	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Moderate Track	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Conservative Track	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Index Track	<input type="text"/> <input type="text"/> <input type="text"/> %
		Static Portfolios**	
<input type="checkbox"/>	OR	100% Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Total Growth Index	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	500 Index	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	90% Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	70% Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	60% Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Balanced Index	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	50% Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	30% Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	20% Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Total Bond Market Index	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Short-Term	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	Cash and Cash Equivalents	<input type="text"/> <input type="text"/> <input type="text"/> %
Total			1 0 0 %

* As your Designated Beneficiary gets older, your assets will move to a progressively more conservative portfolio.

** The assets will remain in the portfolio(s) you select until you choose a new Investment Option.

3. Allocation instructions for future contributions

- Your future contributions will be invested in the Investment Option(s) you select below until you change them, which can be done at any time.

Note: This change applies only to the allocation of your future contributions; it will not affect the assets currently held in your Account. If you also want to change the allocations for your existing assets, be sure to complete both **Sections 2 and 3**.

Age-Based Tracks*

Aggressive Track	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderate Track	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Conservative Track	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Index Track	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %

Static Portfolios**

100% Equity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Total Growth Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
500 Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
90% Equity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
70% Equity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
60% Equity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Balanced Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
50% Equity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
30% Equity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
20% Equity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Total Bond Market Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Short-Term	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Cash and Cash Equivalents	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %

Total

%

* As your Designated Beneficiary gets older, your assets will move to a progressively more conservative portfolio.

** The assets will remain in the portfolio(s) you select until you choose a new Investment Option.

4. Signature — YOU MUST SIGN BELOW

All Learning Quest Account Owners, Responsible Individual or Custodian must sign this form.

I authorize the change 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 Handbook, and understand the rules and regulations governing Learning Quest.

SIGNATURE

Signature of Primary Account Owner/Responsible Individual/Custodian

□□ — □□ — □□□□

Date (mm/dd/yyyy)

SIGNATURE

Signature of Joint Account Owner

□□ — □□ — □□□□

Date (mm/dd/yyyy)