

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		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Aggressive Track	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Moderate Track	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Conservative Track	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Index Track	
		Static Portfolios**	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		100% Equity	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Total Growth Index	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		500 Index	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		90% Equity	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		70% Equity	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		60% Equity	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Balanced Index	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		50% Equity	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		30% Equity	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		20% Equity	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Total Bond Market Index	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Short-Term	
<input type="checkbox"/>	OR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Cash and Cash Equivalents	
		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)