Learning Quest

Investment Option Change/ Future Allocation Form



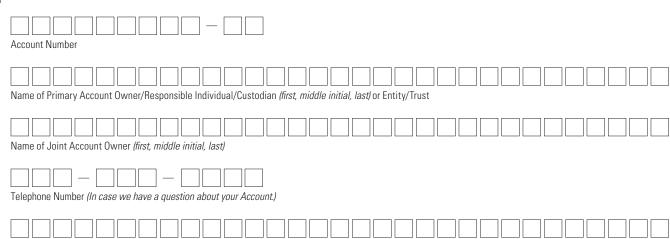
- You can change investment options or change your future allocations by completing this form, by telephone at **1-800-579-2203**, or online at **learningquest.com**. Before selecting an investment option, review the Learning Quest Handbook (Handbook) or visit learningquest.com for complete information 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.**

1. Account information



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



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DO NOT STAPLE

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 FR	ОМ	Investment Option	Change TO		
All	Percentage	Age-Based Tracks*			
	DR %	Aggressive Track	<u>%</u>		
	DR	Moderate Track	<u> </u>		
	DR // %	Conservative Track	<u> </u>		
	DR %	Index Track	<u>%</u>		
		Static Portfolios**			
	OR%	100% Equity	<u> </u>		
	OR // %	Total Growth Index	<u> </u>		
	OR // %	500 Index	<u> </u>		
	DR %	90% Equity	<u>%</u>		
	DR %	70% Equity	<u>%</u>		
	OR %	60% Equity	<u>%</u>		
	DR // %	Balanced Index	<u> </u>		
	DR // %	50% Equity	<u> </u>		
	DR	30% Equity	<u> </u>		
	DR // %	20% Equity	<u> </u>		
	DR // %	Total Bond Market Index	<u> </u>		
	DR // %	Short-Term	<u> </u>		
	DR %	Cash and Cash Equivalents	<u> </u>		
		Total	100%		

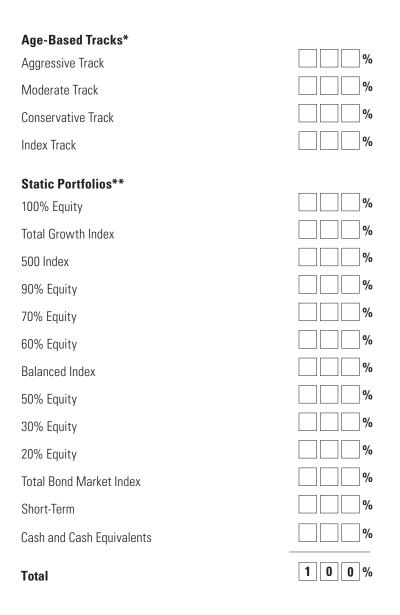
* As your Designated Beneficiary gets older, your assets will move to a progressively more conservative portfolio.

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

DO NOT STAPLE

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**.



* 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.

DO NOT STAPLE

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

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Signature of Joint Account Owner





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