Learning Quest Advisor

Investment Option Change/ Future Allocation Form

LearningQuest® 529 Education Savings Program

- You can change investment options or change your future allocations by completing this form, by telephone at **1-877-822-6236**, or online at **learningquest.com**.
- 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 Advisor
P.O. Box 2947
Shawnee Mission, KS 66201-1347

Or fax this to: **1-617-559-8904**

Forms can be downloaded from our website at **learningquest.com**, or you can call us to order any form — or request assistance in completing this form — at **1-877-882-6236**.

1. Account information

Account Number

Name of Account Owner/Responsible Individual *(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)*

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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.
- Review the Learning Quest Advisor Handbook (Handbook), or visit **learningquest.com** for complete information on the Investment Options available.

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: *All*		*Percentage*	Investment Option	Change TO
			Age-Based Tracks*	
☐	**OR**	☐☐ %	Aggressive Track	☐☐☐ %
☐	**OR**	☐☐ %	Moderate Track	☐☐☐ %
☐	**OR**	☐☐ %	Conservative Track	☐☐☐ %
			Diversified (Static) Portfolios**	
☐	**OR**	☐☐ %	100% Equity	☐☐☐ %
☐	**OR**	☐☐ %	90% Equity	☐☐☐ %
☐	**OR**	☐☐ %	70% Equity	☐☐☐ %
☐	**OR**	☐☐ %	60% Equity	☐☐☐ %
☐	**OR**	☐☐ %	50% Equity	☐☐☐ %
☐	**OR**	☐☐ %	30% Equity	☐☐☐ %
☐	**OR**	☐☐ %	20% Equity	☐☐☐ %
☐	**OR**	☐☐ %	Short-Term	☐☐☐ %
			Single-Fund Portfolios**	
☐	**OR**	☐☐ %	International Growth	☐☐☐ %
☐	**OR**	☐☐ %	Disciplined Growth	☐☐☐ %
☐	**OR**	☐☐ %	Heritage	☐☐☐ %
☐	**OR**	☐☐ %	Small Cap Growth	☐☐☐ %
☐	**OR**	☐☐ %	Sustainable Equity	☐☐☐ %
☐	**OR**	☐☐ %	Value	☐☐☐ %
☐	**OR**	☐☐ %	Mid Cap Value	☐☐☐ %
☐	**OR**	☐☐ %	Global Real Estate	☐☐☐ %
☐	**OR**	☐☐ %	Inflation Protection Bond	☐☐☐ %
☐	**OR**	☐☐ %	Global Bond	☐☐☐ %
☐	**OR**	☐☐ %	Diversified Bond	☐☐☐ %
☐	**OR**	☐☐ %	Cash and Cash Equivalents	☐☐☐ %
				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) until you choose 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.

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 you existing assets, be sure to complete both **Sections 2** and **3**.

		A Units	C Units
Age-Based Tracks: As your Designated Beneficiary gets older, your assets will move to a progressively more conservative portfolio.	Aggressive Track	%	%
	Moderate Track	%	%
	Conservative Track	%	%
Diversified (Static) Portfolios: The assets will remain in the portfolio(s) until you choose a new Investment Option.	100% Equity	%	%
	90% Equity	%	%
	70% Equity	%	%
	60% Equity	%	%
	50% Equity	%	%
	30% Equity	%	%
	20% Equity	%	%
	Short-Term	%	%
Single-Fund Portfolios: The assets will remain in the portfolio(s) until you choose a new Investment Option.	International Growth	%	%
	Disciplined Growth	%	%
	Heritage	%	%
	Small Cap Growth	%	%
	Sustainable Equity	%	%
	Value	%	%
	Mid Cap Value	%	%
	Global Real Estate	%	%
	Inflation Protection Bond	%	%
	Global Bond	%	%
	Diversified Bond	%	%
	Cash and Cash Equivalents	%	%
		100%	100%

4. Signature — YOU MUST SIGN BELOW

All Learning Quest Advisor Account Owners or the Responsible Individual 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 Advisor.

SIGNATURE

Signature of Account Owner/Responsible Individual/Custodian

Date *(mm/dd/yyyy)*

SIGNATURE

Signature of Joint Account Owner

Date *(mm/dd/yyyy)*

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