

MOST—Missouri's 529 Education Plan

Exchange/Future Contribution Allocation Form



- Use this form to exchange your existing investments or change how your future contributions are allocated—or do it online at missourimost.org.
- Complete **Section 2** to exchange your existing investments. **You can do this twice per calendar year.**
- Complete **Section 3** to change how your future contributions will be allocated.
- Print clearly in capital letters and use black ink.

Download forms from our website at missourimost.org, or order them by calling us at **888-414-MOST** (888-414-6678) Monday through Friday, 7 a.m. to 8 p.m., Central time. Return this form in the enclosed postage-paid envelope, or mail to **MOST—Missouri's 529 Education Plan, P.O. Box 219212, Kansas City, MO 64121-9212**. For overnight delivery or registered mail, send to **MOST—Missouri's 529 Education Plan, 1001 E 101st Terrace, Suite 200, Kansas City, MO 64131**.

1. Account Information

Account Number

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

Daytime Telephone Number

Evening Telephone Number

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

REMEMBER TO SIGN IN SECTION 4.



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2. Exchange Existing Investments

- Complete this section to exchange your existing investments—you'll do this by changing how your assets are allocated.
- For more information about your investment options, refer to the Program Description, Privacy Policy, and Participation Agreement (available at missourimost.org) or call us at **888-414-MOST** (888-414-6678).

Note: Completing this section will not change the allocation of your future contributions. Complete **Section 3** to change how your future contributions will be allocated.

Change FROM

Investment Option

Change TO

Check "All" to reallocate 100% of the assets you currently hold in an investment option or indicate the percentage you want to reallocate.

Indicate how you want to invest the total amount of assets you're reallocating. You can choose up to five options, each with an allocation of 5% or more, for a total of 100% (use whole percentages only).

All		Percentage	
<input type="checkbox"/>	OR	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%

Age-Based Options—Designed for Higher Education

Aggressive Age-Based Option	<input type="text"/>	%
Moderate Age-Based Option	<input type="text"/>	%
Conservative Age-Based Option	<input type="text"/>	%

Individual Portfolios

Stock Portfolios:

<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard® Aggressive Growth Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Total Stock Market Index Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Total International Stock Index Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	DFA U.S. Large Cap Value Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	DFA U.S. Small Cap Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	DFA U.S. Core Equity 1 Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	DFA International Core Equity Portfolio	<input type="text"/>	%

Balanced Portfolios:

<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Growth Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Moderate Growth Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Conservative Growth Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Income Portfolio	<input type="text"/>	%

Bond Portfolios:

<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Conservative Income Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Total Bond Market Index Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Total International Bond Index Portfolio	<input type="text"/>	%
<input type="checkbox"/>	OR	<input type="text"/>	%	DFA Two-Year Global Fixed Income Portfolio	<input type="text"/>	%

Short-Term Reserves Portfolio:

<input type="checkbox"/>	OR	<input type="text"/>	%	Vanguard Interest Accumulation Portfolio	<input type="text"/>	%
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TOTAL %

3. Change Allocation of Future Contributions

- Complete this section to change how your future contributions will be invested.
- You can invest your contributions in age-based options designed for saving for higher-education expenses, individual portfolios, or a combination of these. Refer to the Program Description, Privacy Policy, and Participation Agreement for more information.
- Indicate how you want to invest your future contributions. You can choose up to five options, each with an allocation of 5% or more, for a total of 100% (use whole percentages only).
- The choices you indicate below will remain in effect until you make a change online at missourimost.org or submit a new Exchange/Future Contribution Allocation Form.

Note: Completing this section will not affect the assets you currently hold in your account. Complete **Section 2** to exchange your existing assets.

Age-Based Options—Designed for Higher Education

Aggressive Age-Based Option	<input type="text"/> %
Moderate Age-Based Option	<input type="text"/> %
Conservative Age-Based Option	<input type="text"/> %

Individual Portfolios

Stock Portfolios:

Vanguard Aggressive Growth Portfolio	<input type="text"/> %
Vanguard Total Stock Market Index Portfolio	<input type="text"/> %
Vanguard Total International Stock Index Portfolio	<input type="text"/> %
DFA U.S. Large Cap Value Portfolio	<input type="text"/> %
DFA U.S. Small Cap Portfolio	<input type="text"/> %
DFA U.S. Core Equity 1 Portfolio	<input type="text"/> %
DFA International Core Equity	<input type="text"/> %

Balanced Portfolios:

Vanguard Growth Portfolio	<input type="text"/> %
Vanguard Moderate Growth Portfolio	<input type="text"/> %
Vanguard Conservative Growth Portfolio	<input type="text"/> %
Vanguard Income Portfolio	<input type="text"/> %

Bond Portfolios:

Vanguard Conservative Income Portfolio	<input type="text"/> %
Vanguard Total Bond Market Index Portfolio	<input type="text"/> %
Vanguard Total International Bond Index Portfolio	<input type="text"/> %
DFA Two-Year Global Fixed Income Portfolio	<input type="text"/> %

Short-Term Reserves Portfolio:

Vanguard Interest Accumulation Portfolio	<input type="text"/> %
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TOTAL %

Please remember to:

- Choose no more than five investments for your account.
- Allocate at least 5% to each investment you choose.
- Use whole numbers.
- Sign in **Section 4**.

4. Authorization—YOU MUST SIGN BELOW

I certify that the information provided herein is true and complete in all respects.

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Signature of Account Owner

/ /

Date (month, day, year)

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