

College SAVE Plan

Exchange/Future Contribution (Allocation) Form

College SAVE™

Bank of North Dakota's 529 Plan

THIS FORM IS INTENDED FOR INDIVIDUAL INVESTOR USE ONLY.

- Print clearly, preferably in capital letters and black ink.
- You can easily exchange existing assets or change your future contribution online at www.collegesave4u.com.
- Complete Section 2 to exchange existing assets to a new investment option. (You can do this only twice in a calendar year.)
- Complete Section 3 to change your allocation instructions for future contributions.

Forms can be downloaded from our website at **www.collegesave4u.com**, or you can call us to order any form — or request assistance in completing this form at **1.866.SAVE.529 (866.728.3529)** any business day from 8 a.m. to 8 p.m. ET.

Return this form to:

**College SAVE
P.O. Box 219781
Kansas City, MO 64121-9781**

For overnight delivery or registered mail, send to:

College SAVE
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

1. Account Information

$$\square\square\square\square\square\square\square\square - \square\square$$

Account Number

[illegible]

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

$$\boxed{}\boxed{}\boxed{} - \boxed{}\boxed{}\boxed{} - \boxed{}\boxed{}\boxed{}\boxed{}$$

Daytime Telephone Number

$$\square\square\square - \square\square\square - \square\square\square\square$$

Evening Telephone Number

[illegible]

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



2. Exchange Instructions for Existing Assets

- For each investment option you hold and wish to exchange, tell us the percentage of assets you want moved and where you want the assets invested. *(You must allocate at least 5% of your exchange amount to each investment that you choose. Use whole percentages only.)*
- See the College SAVE Plan Disclosure Statement *(available at www.collegesave4u.com)* for complete information on the investment you're considering.
- This exchange does not affect the allocation of your future contributions.
- Important:** You may choose no more than five investment options for your account.
- Remember:** Federal law allows Participants to make two exchanges each calendar year.

Exchange FROM			Investment Option	Exchange TO
<i>(Check "All" or indicate a percentage for each investment option. Indicate your total exchange amount your current investment that you want to move to a new investment.)</i>				<i>(Indicate the percentage of your total exchange amount that you want invested in each option.)</i>
All		Percentage	Target Enrollment Portfolios	
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2042/2043	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2040/2041	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2038/2039	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2036/2037	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2034/2035	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2032/2033	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2030/2031	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2028/2029	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2026/2027	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Target Enrollment 2024/2025	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Commencement Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
			Individual Portfolios	
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Aggressive Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Moderate Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Conservative Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Interest Accumulation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
			TOTAL	1 0 0 %

3. Instructions for Future Allocations

- Your future contributions, which can be updated at any time, will be invested in the options you select until you change them.
- Before choosing your investment, see the College SAVE Plan Disclosure Statement (available at www.collegesave4u.com) for complete information about the investment offered.
- You may allocate your contribution among a maximum of five investment options.
- You must allocate at least 5% of your contributions to each investment that you choose. Use whole percentages only.

Note: This change applies only to the allocation of your future contributions; it will not affect the assets currently held in your account..

Target Enrollment Portfolios

(Your investment mix automatically becomes more conservative as the beneficiary nears target enrollment year.)

Target Enrollment 2042/2043	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2040/2041	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2038/2039	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2036/2037	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2034/2035	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2032/2033	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2030/2031	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2028/2029	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2026/2027	<input type="text"/> <input type="text"/> <input type="text"/> %
Target Enrollment 2024/2025	<input type="text"/> <input type="text"/> <input type="text"/> %
Commencement Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

Individual Portfolios

(The assets will remain in the portfolio you select until you exchange them to a new investment option.)

Aggressive Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderate Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Interest Accumulation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

TOTAL %

4. Signature — YOU MUST SIGN BELOW

I authorize the exchange of assets in my account to the investments I selected in Section 2 and/or the allocation of my future contributions to the investments I selected in Section 3. I certify that I have read the College SAVE Plan Disclosure Statement and Participation Agreement.

SIGNATURE

Signature of Participant

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Date (mm-dd-yyyy)