NEST 529 ADVISOR PLAN

NEST Advisor College Savings Plan

Investment Option Change/Future Contribution Allocation Form

- Use this form to request your twice per calendar year Investment Option change or to change your future contribution allocations.
- Complete **Section 2** to change your current Investment Options to new Investment Options. *(You can do this only 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 listed. Do not staple.

Forms can be downloaded from our website at **www.NEST529Advisor.com,** or you can call us to order any form — or request assistance in completing this form — at **1.888.659.6378** any business day from 8 a.m. to 8 p.m. Central time.

1.888.659.6378
8 a.m. to 8 p.m. Central time M-F

www.NEST529Advisor.com

clientservice@NEST529Advisor.com

Regular mailing address:
NEST Advisor College Savings Plan
P.O. Box 30277
Omaha, NE 68103-1377

Overnight mailing address:
NEST Advisor College Savings Plan
920 Main Street, Suite 900
Kansas City, MO 64105

1. Account information

☐☐☐☐☐☐☐☐☐ – ☐☐
Account Number

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

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Telephone Number *(In case we have a question about your Account.)*

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

NEST ADV EXCHANGE

2. Investment Option Change

- For each Investment Option you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the NEST Advisor College Savings Plan (NEST Advisor Plan) Program Disclosure Statement and Participation Agreement (Program Disclosure Statement), available at **www.NEST529Advisor.com,** for complete information on Investment Option.

Remember: Federal law allows Account Owners to make two Investment Option 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 investments.

Exchange FROM			Investment Option	Exchange TO
All		*Percentage*	**Age-Based Investment Options**	
☐	**OR**	%	Age-Based Aggressive	%
☐	**OR**	%	Age-Based Growth	%
☐	**OR**	%	Age-Based Index	%
			Static Investment Options	
☐	**OR**	%	All Equity Static	%
☐	**OR**	%	Growth Static	%
☐	**OR**	%	Moderate Growth Static	%
☐	**OR**	%	Balanced Static	%
☐	**OR**	%	Conservative Static	%
☐	**OR**	%	Bank Savings Static	%
			Individual Investment Options	
☐	**OR**	%	State Street S&P 500® Index	%
☐	**OR**	%	Vanguard Total Stock Market ETF	%
☐	**OR**	%	Dodge & Cox Stock	%
☐	**OR**	%	T. Rowe Price Large Cap Growth	%
☐	**OR**	%	SPDR S&P® Dividend ETF	%
☐	**OR**	%	Vanguard Extended Market ETF	%
☐	**OR**	%	Tributary Small Company	%
☐	**OR**	%	iShares Russell 2000 Growth ETF	%
☐	**OR**	%	Vanguard REIT ETF	%
☐	**OR**	%	State Street MSCI® ACWI ex USA Index	%
☐	**OR**	%	American Funds The Income Fund of America®	%
☐	**OR**	%	Vanguard FTSE Emerging Markets ETF	%
☐	**OR**	%	DFA World ex-US Government Fixed Income	%
☐	**OR**	%	MetWest Total Return Bond	%
☐	**OR**	%	Federated Total Return Bond	%
☐	**OR**	%	iShares Core US Aggregate ETF	%
☐	**OR**	%	Vanguard Short-Term Bond ETF	%
☐	**OR**	%	Vanguard Short-Term Inflation-Protected Index	%
☐	**OR**	%	Goldman Sachs Financial Square℠ Government Money Market	%
				1 0 0 %

3. Allocation instructions for future contributions

- If you have added additional Investment Options in **Section 2**, please be sure that the allocations below reflect the correct Investment Options.
- Your future contributions will be invested in the Investment Options indicated below; it will not affect assets currently held in your account.

Age-Based Investment Options	
Age-Based Aggressive	%
Age-Based Growth	%
Age-Based Index	%
Static Investment Options	
All Equity Static	%
Growth Static	%
Moderate Growth Static	%
Balanced Static	%
Conservative Static	%
Bank Savings Static	%
Individual Investment Options	
State Street S&P 500® Index	%
Vanguard Total Stock Market ETF	%
Dodge & Cox Stock	%
T. Rowe Price Large Cap Growth	%
SPDR S&P® Dividend ETF	%
Vanguard Extended Market ETF	%
Tributary Small Company	%
iShares Russell 2000 Growth ETF	%
Vanguard REIT ETF	%
State Street MSCI® ACWI ex USA Index	%
American Funds The Income Fund of America®	%
Vanguard FTSE Emerging Markets ETF	%
DFA World ex-US Government Fixed Income	%
MetWest Total Return Bond	%
Federated Total Return Bond	%
iShares Core US Aggregate ETF	%
Vanguard Short-Term Bond ETF	%
Vanguard Short-Term Inflation-Protected Index	%
Goldman Sachs Financial Square℠ Government Money Market	%
	100 %

4. Signature — YOU MUST SIGN BELOW

- I certify that I have read, understand, consent, and agree to all the terms and conditions of the Program Disclosure Statement and understand the rules and regulations of the NEST Advisor Plan as they relate to this Investment Option Change/Future Contribution Allocation request.
- By signing below, I authorize the Program Manager or its designees to change my Investment Options and/or my allocations for future contributions according to the instructions above.
- If the Account is owned by an entity or trust, I certify that I am authorized to act on its behalf in making this request. If the Account is a minor-owned Account or is funded with UGMA/UTMA assets, I further certify that I am the parent/guardian/custodian of the Account in question, and that the request is in the best interest of the Beneficiary.

SIGNATURE

Signature of Account Owner

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Date *(mm/dd/yyyy)*