Future Path 529 Plan

Exchange/Future Contribution (Allocation) Form

Future Path 529 Plan

- You can exchange existing assets or change your future contributions by completing this form, by telephone at **1.800.587.7305** or online at **www.futurepath529.com**.
- Complete **Section 2** to exchange existing assets to a new Investment Option. *(There may be limitations regarding how frequently this type of change may be done.)*
- 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.

Forms can be downloaded from our website at **www.futurepath529.com**, or you can call us to order any form — or request assistance in completing this form — at **1.800.587.7305** any business day from 8 a.m. to 8 p.m. Eastern time.

Return this form and any other required documents to:
Future Path 529 Plan
P.O. Box 55578
Boston, MA 02205-5578

For overnight delivery or registered mail, send to:
Future Path 529 Plan
95 Wells Avenue, Suite 155
Newton, MA 02459

1. Acccount information

Account Number

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

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

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

NV FP 529 EXCH

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. Assets will stay in the same share class.
- You must allocate at least **1%** of your contributions to each Investment Option that you choose. Use whole percentages only.
- Your investment percentages must total **100%**.
- See the Future Path 529 Plan Description and Participation Agreement ("Plan Description"), *available at* **www.futurepath529.com,** for complete information about the Investment Option(s) you are considering.

Remember: Federal law allows Account Owners to make only two investment exchanges 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 *All*		Exchange FROM *Percentage*	Investment Option	Exchange TO
			Enrollment Year Portfolios	
☐	**OR**	☐☐ %	Future Path 529 College 2042 Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 College 2039 Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 College 2036 Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 College 2033 Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 College 2030 Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 College 2027 Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 College Enrollment Portfolio	☐☐☐ %

Designed to allow you to select a Portfolio based upon the Beneficiary's anticipated year of enrollment. The asset allocation of these Portfolios is automatically adjusted over time to become more conservative.

			Asset Allocation Portfolios	
☐	**OR**	☐☐ %	Future Path 529 Aggressive Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 Moderate Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 Conservative Portfolio	☐☐☐ %
			Individual Portfolios	
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders U.S. Equity ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan Active Growth ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan Active Value ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders U.S. Mid Cap Equity ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders U.S. Small Cap Equity ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan U.S. Sustainable Leaders Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders International Equity ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan ActiveBuilders Emerging Markets Equity ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders MSCI U.S. REIT ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders U.S. Aggregate Bond ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders USD Investment Grade Corporate Bond ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan Inflation Managed Bond ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan Income ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan BetaBuilders USD High Yield Corporate Bond ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan International Bond Opportunities ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan Ultra-Short Income ETF Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Future Path 529 JPMorgan Stable Asset Income Portfolio	☐☐☐ %
			TOTAL	☐☐☐ %

3. Allocation instructions for future contributions

- Your future contributions will be invested in the Investment Option(s) you select until you change them, which can be done at any time.
- Before choosing your Investment Option(s), see the Plan Description, *available at* **www.futurepath529.com,** for complete information about the Investment Options offered.
- You must allocate at least **1%** of your contributions to each Investment Option that you choose. Use whole percentages only.
- Your investment percentages must total **100%**.

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

Enrollment Year Portfolios:

Future Path 529 College 2042 Portfolio	☐☐☐ %
Future Path 529 College 2039 Portfolio	☐☐☐ %
Future Path 529 College 2036 Portfolio	☐☐☐ %
Future Path 529 College 2033 Portfolio	☐☐☐ %
Future Path 529 College 2030 Portfolio	☐☐☐ %
Future Path 529 College 2027 Portfolio	☐☐☐ %
Future Path 529 College Enrollment Portfolio	☐☐☐ %

Designed to allow you to select a Portfolio based upon the Beneficiary's anticipated year of enrollment. The asset allocation of these Portfolios is automatically adjusted over time to become more conservative.)

Check Unit Class if also changing Class for **future purchases:**

- ☐ A-Class
- ☐ C-Class
- ☐ Z-Class *(If eligible)*

Asset Allocation Portfolios:

Future Path 529 Aggressive Portfolio	☐☐☐ %
Future Path 529 Moderate Portfolio	☐☐☐ %
Future Path 529 Conservative Portfolio	☐☐☐ %

Individual Portfolios:

Future Path 529 JPMorgan BetaBuilders U.S. Equity ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan Active Growth ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan Active Value ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan BetaBuilders U.S. Mid Cap Equity ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan BetaBuilders U.S. Small Cap Equity ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan U.S. Sustainable Leaders Portfolio	☐☐☐ %
Future Path 529 JPMorgan BetaBuilders International Equity ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan ActiveBuilders Emerging Markets Equity ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan BetaBuilders MSCI U.S. REIT ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan BetaBuilders U.S. Aggregate Bond ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan BetaBuilders USD Investment Grade Corporate Bond ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan Inflation Managed Bond ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan Income ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan BetaBuilders USD High Yield Corporate Bond ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan International Bond Opportunities ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan Ultra-Short Income ETF Portfolio	☐☐☐ %
Future Path 529 JPMorgan Stable Asset Income Portfolio	☐☐☐ %
TOTAL	☐☐☐ %

4. Signature — YOU MUST SIGN BELOW

By signing below, I hereby certify that:

- I have received the Future Path 529 Plan Description and Participation Agreement ("Plan Description"). I understand that by signing this form, I am agreeing to be bound by the terms and conditions of the Plan Description. I understand that the Future Path 529 Plan® ("Plan") may from time to time amend the Plan Description, and I agree I will be subject to the terms of those amendments. I understand that the Plan Description and this form shall be construed, governed, and interpreted in accordance with the laws of the State of Nevada.
- I understand that the Plan Description and the Plan forms signed by me constitute the entire agreement between myself and the Trust (as defined in the Plan Description). No person is authorized to make an oral modification to this agreement.
- I understand that I may incur federal, state or local income and penalty taxes as a consequence of certain activities, including without limitation non-qualified withdrawals, terminating my Account, or changing my Designated Beneficiary to an ineligible person. Account Owners should seek advice from a qualified tax professional.
- I understand that contributions to my Account in the Plan are not insured and that neither the principal I contribute nor the investment returns are guaranteed by the Federal Deposit Insurance Corporation or Ascensus College Savings Recordkeeping Services, LLC, JPMorgan Distribution Services, LLC, JPMorgan Investment Management Inc., the Board of Trustees of the College Savings Plans of Nevada (the "Board"), the Nevada State Treasurer, the State of Nevada, all agencies, instrumentalities and funds of the State of Nevada, the Nevada College Savings Trust Fund (the "Trust"), the Plan, and their respective affiliates, officials, officers, directors, employees, and representatives (collectively, the "Plan Officials"). I understand that there is no assurance that my Account under the Plan will generate any specific rate of return; and there is no assurance that the Account will not decrease in value. I understand that I could lose money.
- I understand that contributions that cause the total balance of this Account and any other Accounts established in the Plan and in any other Qualified Tuition Program offered by the State of Nevada on behalf of the Designated Beneficiary to exceed the Maximum Account Balance established by the Board are not permitted. I understand that if a contribution is made to my Account that exceeds the Maximum Account Balance, all or a portion of the contribution amount will be returned to me or the contributor.
- All the information that I provided on this form is true and accurate, that Ascensus College Savings Recordkeeping Services, LLC and its affiliates are entitled to rely on the information provided herein and the instructions provided on this form, and that I am bound by any and all statutory, administrative, and operating procedures that govern the Plan.

I authorize the exchange 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 Plan Description.

SIGNATURE
Signature of Account Owner

__ __ – __ __ – __ __ __ __
Date *(mm/dd/yyyy)*

J.P.Morgan
ASSET MANAGEMENT