



TNStars College Savings 529 Program Investment Change/Future Contribution Allocation Form

- Use this form to request one of your twice per calendar year Investment Option changes 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 Investment Option(s) 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.tnstars.com, or you can call us to order any form—or request assistance in completing this form—at **855.386.7827** any business day from 8 a.m. to 4:30 p.m. Central time.

855.386.7827
8:00 a.m. to 4:30 p.m. Central Time M-F

[**www.tnstars.com**](http://www.tnstars.com)

[**TN.STARS@tn.gov**](mailto:TN.STARS@tn.gov)

Regular mailing address:
TNStars College Savings 529 Program
P.O. Box 55597
Boston, MA 02205-5597

Overnight mailing address:
TNStars College Savings 529 Program
95 Wells Ave, Suite 155
Newton, MA 02459-3204

1. Account information

Account Number

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

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

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



2. Investment Option Change

- For each Investment Option you hold and wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the TNStars College Savings 529 Program Disclosure Brochure (also available at www.tnstars.com), for complete information about the Investment Options you are considering.
- Please select one or more Investment Options from the choices below. If you choose one Investment Option please indicate 100% next to the option. If you choose more than one Investment Option please indicate the percentage amount of the assets you would like to invest into each selected Investment Option.
- Use whole percentages only.
- Your investment percentages must total **100%**.

Remember: Federal law allows Participants 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. If you would like to change how future contributions are invested, please complete **Section 3**.

Exchange FROM		Investment Options	Exchange TO
<i>All</i>			
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Age-Based Options:	
		TN 0-2 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 3-4 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 5-6 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 7-8 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 9-10 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 11-12 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 13-14 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 15-16 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 17-18 Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		TN 19+ Age Band	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Self-Selected Investment Options:	
		Growth	
<input type="checkbox"/>	OR	TN Aggressive Growth Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Emerging Markets Stock Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Total International Stock Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Real Estate Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Small Cap Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN US Large Cap Value Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Total Stock Market Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Balanced	
<input type="checkbox"/>	OR	TN Balanced Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
		Conservative	
<input type="checkbox"/>	OR	TN Total International Bond Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN High-Yield Corporate Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Core Plus Bond Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Total Bond Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Short-Term Corporate Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Short-Term Inflation Protected Securities Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	TN Money Market Fund	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
TOTAL			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.
- Please select one or more Investment Options from the choices below. If you choose one Investment Option please indicate 100% next to the option. If you choose more than one Investment Option please indicate the percentage amount of the assets you would like to invest into each selected Investment Option.
- Use whole percentages only.
- Your investment percentages must total **100%**.

Age-Based Options:

TN 0-2 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 3-4 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 5-6 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 7-8 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 9-10 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 11-12 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 13-14 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 15-16 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 17-18 Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN 19+ Age Band	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

Self-Selected Investment Options:

Growth

TN Aggressive Growth Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Emerging Markets Stock Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Total International Stock Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Real Estate Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Small Cap Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN US Large Cap Value Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Total Stock Market Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

Balanced

TN Balanced Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
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Conservative

TN Total International Bond Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN High-Yield Corporate Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Core Plus Bond Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Total Bond Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Short-Term Corporate Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Short-Term Inflation Protected Securities Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TN Money Market Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

TOTAL

1 0 0 %

4. Signature — YOU MUST SIGN BELOW

- I certify that I have read, understand, consent, and agree to all the terms and conditions of the TNStars College Savings 529 Program Disclosure Brochure and understand the rules and regulations of the TNStars College Savings 529 Program as they relate to this Investment Option Change/Future Contribution Allocation request.
- By signing below, I authorize the TNStars College Savings 529 Program 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 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 Participant

□□ — □□ — □□□□

Date (mm/dd/yyyy)