

2. Current Investment Option change

- For each current Investment Option you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the Plan Disclosure Booklet and the Plan website mt.savewithable.com, for complete information on Investment Options.
- Your total Investment Option percentages in the "Exchange TO" column below must equal 100%. If the percentages do not equal 100%, your current allocation will remain the same.
- Exchanges to or from the Checking Account Option require two business days to be completed.
- Complete **Section 4** if the Checking Account Option is selected and the Account does not currently invest, or has not previously invested, in the Checking Account Option. **Important Note for Entities: Entities may not select the Checking Account Option unless they are opening the Account as agent under a power of attorney designated by an Account Owner with Legal Capacity.**

Remember: Internal Revenue Code Section 529A allows Account Owners to make up to 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 future contributions.

Exchange FROM		Investment Option	Exchange TO	
All	Percentage			
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Aggressive Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Moderately Aggressive Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Growth Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Moderate Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Moderately Conservative Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Conservative Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Money Market Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Checking Account Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
			1 0 0 %	

3. Allocation instructions for future contributions

- To change the Investment Option allocation of future Account contributions, indicate the new allocations below.
- Future contribution allocations will not affect assets currently held in the Account.
- The total Investment Option percentages must equal 100%. If the percentages do not equal 100%, current allocations for future contributions will remain the same.
- Exchanges to or from the Checking Account Option require two business days to be completed.
- Complete **Section 4** if the Checking Account Option is selected and the Account does not currently invest, or has not previously invested, in the Checking Account Option. **Important Note for Entities: Entities may not select the Checking Account Option unless they are opening the Account as agent under a power of attorney designated by an Account Owner with Legal Capacity.**

Aggressive Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderately Aggressive Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Growth Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderate Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderately Conservative Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Conservative Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Money Market Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Checking Account Option	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
1 0 0 %	

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