

Use this form to make one of the twice per calendar year changes to current investment allocations. If you have questions completing this form, please call us toll free at **1.888.244.5674**, 8:00 am to 7:00 pm, Eastern time.

Regular Mail:

Future Scholar 529 Savings Plan
P.O. Box 219812
Kansas City, MO 64121-9812

Overnight Mail:

Future Scholar 529 College Savings Plan
801 Pennsylvania Ave STE 219812
Kansas City, MO 64105-1307

1. Current Account Information

A. Designated Beneficiary's Account Information

Current Account Number

Designated Beneficiary's First name

Middle initial

Last name

Designated Beneficiary's Social Security number

B. Account Owner information

If not an individual, indicate the type of entity (e.g., a trust) and insert the entity's legal name.

Primary Account Owner's First name (or entity name)

Middle initial

Last name

Social Security number or other Taxpayer Identification Number

Date of Birth (MM/DD/YYYY)

Joint Account Owner's First name

Middle initial

Last name

Mobile Phone Number

Home Phone Number

2. Portfolio Choices

Portfolio choices are described in detail in the Program Description, available at futurescholar.com. You are permitted to transfer existing balances between Portfolios twice per calendar year and upon a change in the Designated Beneficiary of the Account. See the Program Description for details.

Note: Your allocations must collectively equal 100%. If your Portfolio allocations total less than 100%, unallocated amounts will be automatically allocated to the Legacy Capital Preservation Portfolio. If your Portfolio allocations total more than 100%, the contribution will be returned to you.

- A. **Age-Based Choice** - An initial Allocation Portfolio will be selected based on the date of birth of the Designated Beneficiary and a risk track, as you select. Over time, the Account will be reinvested automatically from the initial Allocation Portfolio to Allocation Portfolios with an increasing fixed income emphasis.

Note: This option is designed for college (or other higher learning) expenses and may not be appropriate for shorter time periods applicable to attendance at elementary or secondary schools. See the Program Description for more complete details.

Age-Based Options: Choose one Risk Track	Amount of Contribution to be Allocated (in %)
<input type="checkbox"/> Aggressive Track	%
<input type="checkbox"/> Moderate Track	%
<input type="checkbox"/> Conservative Track	%

- B. **Customized Portfolio Selection Choice** – You may select one or more Portfolios by indicating allocation percentages in the table below. Your investment allocation remains fixed or “static” within a specified range.

Target Allocation Options:	Amount of Contribution to be Allocated (in %)
Future Scholar Aggressive Growth Portfolio	%
Future Scholar Growth Portfolio	%
Future Scholar Moderate Growth Portfolio	%
Future Scholar Moderate Portfolio	%
Future Scholar Moderately Conservative Portfolio	%
Future Scholar Conservative Portfolio	%
Future Scholar College Portfolio	%
Equity Options:	
Future Scholar International Equity Index Portfolio	%
Future Scholar Large Cap Index Portfolio	%
Future Scholar Mid Cap Index Portfolio	%
Future Scholar Small Cap Index Portfolio	%
Fixed Income Options:	
Future Scholar Bond Index Portfolio	%
Future Scholar Short Term Bond Index Portfolio	%
Future Scholar TIPS Bond ETF Portfolio	%
Future Scholar Ultra Short Term Bond Portfolio	%
Cash and Cash Equivalent Options:	
Future Scholar Bank Deposit Portfolio	%
Future Scholar Legacy Capital Preservation Portfolio	%
TOTAL	%

C. **Dollar Cost Averaging from the Future Scholar Legacy Capital Preservation Portfolio**

Complete this section to have your contribution in the Future Scholar Legacy Capital Preservation Portfolio allocated monthly or quarterly into other portfolios available in the Plan. To take advantage of this option, you must have at least \$1,000 to contribute and you must set up your monthly or quarterly allocations at this time. By completing this section, you authorize Future Scholar's 529 College Savings Program Direct Plan to allocate the amount you designate from the Future Scholar Legacy Capital Preservation Portfolio on a monthly or quarterly basis into your chosen investment options. Allocations continue until no balance remains in the Legacy Capital Preservation portfolio. You have the option to cease or alter your monthly or quarterly allocations only in the limited circumstances described in the Program Description.

i. **Dollar Cost Averaging Initial investment** (\$1,000 Minimum)

Future Scholar Legacy Capital Preservation Portfolio	%
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ii. Please indicate the frequency for making allocations from the Future Scholar Legacy Capital Preservation Portfolio to the portfolio(s) designated in 3C below. If you do not indicate a draft date, the systematic exchange will be processed on the 15th of the month or quarter. Systematic Exchange will be processed Monthly Quarterly on the _____ day.

iii. **SYSTEMATIC EXCHANGE**

Please allocate the dollar amount indicated into the investment options selected below. Allocations continue until no balance remains in the Future Scholar Legacy Capital Preservation Portfolio.

SYSTEMATIC EXCHANGE Portfolio Selection: Note minimum systematic exchange amount is \$25.00 per portfolio.

Age-Based Portfolio Selection Choice (portfolio will be based on the beneficiary's date of birth and the risk track selected below).

Note: This option is designed for college (or other higher learning) expenses and may not be appropriate for shorter time periods applicable to attendance at elementary or secondary schools. See the Program Description for more complete details.

Age-Based Options: <i>If investing in age-based Choose one Risk Track</i>	Systematic Exchange Amount
Aggressive Track	\$
Moderate Track	\$
Conservative Track	\$

Customized Portfolio Selection Choice – You may select one or more Portfolios by indicating the dollar amount(s) in the table below. Your investment allocation remains fixed or “static” within a specified range.

Target Allocation Options:	Systematic Exchange Amount
Future Scholar Aggressive Growth Portfolio	\$
Future Scholar Growth Portfolio	\$
Future Scholar Moderate Growth Portfolio	\$
Future Scholar Moderate Portfolio	\$
Future Scholar Moderately Conservative Portfolio	\$
Future Scholar Conservative Portfolio	\$
Future Scholar College Portfolio	\$
Equity Options:	
Future Scholar International Equity Index Portfolio	\$
Future Scholar Large Cap Index Portfolio	\$
Future Scholar Mid Cap Index Portfolio	\$
Future Scholar Small Cap Index Portfolio	\$
Fixed Income Options:	
Future Scholar Bond Index Portfolio	\$
Future Scholar Short Term Bond Index Portfolio	\$
Future Scholar TIPS Bond ETF Portfolio	\$
Future Scholar Ultra Short Term Bond Portfolio	\$
	TOTAL

3. Amount of transfer

Note: Indicate below the amount you would like to transfer (choose one):

- A. Transfer the entire account listed in Section 1 to the Portfolio Choices selected in Section 2.
- B. Transfer the following amount(s) of the account listed in Section 1 to the Portfolio Choices selected in Section 2. The amount(s) below will be invested based on the percentage allocated to each Portfolio selected in Section 2.

Portfolio Number	Portfolio Name	Amount
<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"/>	OR _____	\$ _____
<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"/>	OR _____	\$ _____

4. Automatic Contribution Plan

This section only applies if you have existing bank instructions on file for the account listed in Section 1.**

Please review the following information regarding the account options on your current and any new account(s) opened as a result of this investment change

If you are moving the entire account balance:

Any active Automatic Contribution Plan (ACP) will be stopped on your current account unless otherwise indicated below.

- A. I would like to continue the existing ACP into the account listed in Section 1.
- B. I would like to start an ACP for \$ _____ on the _____ day of each month. Invest my contributions according to the percentages I allocated to each new Portfolio in Section 2. Only bank information on file will be used.**

If you are moving a portion of the current account balance:

Any active Automatic Contribution Plan (ACP) will remain on your current account and an ACP will not be established on the new account unless otherwise indicated below.

- A. Stop the ACP on the current account listed in Section 1.
- B. Modify the ACP on the current account listed in Section 1 to \$ _____ on the _____ day of each month
- C. Start an ACP for \$ _____ on the _____ day of each month. Invest my contributions according to the percentages I allocated to each new Portfolio in Section 2. Only bank information on file will be used.**

** Log in online at www.futurescholar.com or complete an Account Update/Automatic Contributions Change form to update bank information, to establish an ACP, or add electronic bank transfer to the accounts.

5. Signature(s)

I hereby ratify these written instructions and any telephone instructions given pursuant to this authority. I also agree that neither Future Scholar 529 College Savings Plan, Columbia Management Investment Distributors, Inc. or its affiliates nor the State of South Carolina Office of the Treasurer will be liable for any loss, liability, cost, or expense for acting upon such instructions. I understand that telephone calls to Future Scholar 529 College Savings Plan may be recorded, and I consent to such tape recordings.

Print Name of Account Owner (Include capacity, if applicable)

Signature of Account Owner

Date

Print Name of Joint Tenant (if applicable)

Signature of Joint Tenant

Date

