

**Complete This Form With Your Financial Advisor
to Change Investment Portfolios.**

If you have questions, please call us at **866.529.2228**,
Monday–Friday, 7:30 a.m. to 6 p.m. (Central).

1. Current Account Information

Account Number: _____

Account Owner Name (First, M.I., Last): _____

Daytime Phone Number: _____ Evening Phone Number: _____

Beneficiary Name (First, M.I., Last): _____

Beneficiary Date of Birth (MM/DD/YYYY): _____

2. New Investment Portfolios **Check only one box: A, B, or C**

(Your total Account balance will be transferred to the Portfolio(s) you select below AND all future contributions will be invested in the Portfolios you select below.)

A. Age-Based Portfolios (If you've checked box A, **select one** of the following)

- Aggressive Portfolio Moderate Portfolio Conservative Portfolio

B. Target Portfolios (If you've checked box B, **select one** of the following)

- Fund 100 Fund 80 Fund 60 Fund 40 Fund 20 Fixed Income Fund

C. Individual Fund Portfolios (If you've checked box C, **select any** of the following [must total 100%, only whole percentages allowed])"

Money Market

_____ % BlackRock Cash Funds 529 Portfolio

Fixed Income

_____ % PIMCO Short-Term 529 Portfolio

_____ % Northern Funds Bond Index 529 Portfolio

_____ % Fidelity Advisor Investment Grade Bond 529 Portfolio

_____ % MainStay Total Return Bond 529 Portfolio

_____ % American Century Short Duration Inflation Protection Bond 529 Portfolio

_____ % BlackRock Inflation Protected Bond 529 Portfolio

_____ % Touchstone High Yield 529 Portfolio

_____ % Templeton International Bond 529 Portfolio

Balanced

_____ % T. Rowe Price Balanced 529 Portfolio

Real Estate

_____ % T. Rowe Price Real Estate 529 Portfolio

_____ % Voya Global Real Estate 529 Portfolio

Commodities

_____ % Credit Suisse Commodity Return Strategy 529 Portfolio

Domestic (U.S.) Equity

Large-Cap

_____ % Cohen & Steers Dividend Value 529 Portfolio

_____ % Northern Funds Stock Index 529 Portfolio

_____ % American Century Equity Growth 529 Portfolio

_____ % T. Rowe Price Large-Cap Growth 529 Portfolio

Mid-Cap

_____ % Northern Funds Mid Cap Index 529 Portfolio

Small-Cap

_____ % William Blair Small Cap Value 529 Portfolio

_____ % Northern Funds Small Cap Index 529 Portfolio

_____ % Lord Abbett Developing Growth 529 Portfolio

International Equity

_____ % Northern Funds International Equity Index 529 Portfolio

_____ % Neuberger Berman International Select 529 Portfolio

_____ % DFA International Small Company 529 Portfolio

_____ % Lazard Emerging Markets Equity 529 Portfolio

3. Authorization

I hereby authorize and direct the change of Investment Portfolio(s) to the investments I selected in Section 2. **I acknowledge that my total Account balance will be transferred to the Portfolio(s) I selected in Section 2 AND all future Contributions will be invested in the Portfolio(s) selected above.** I certify that all the information contained herein is true and correct and that I have read the Program Disclosure Statement and understand the rules and requirements governing investment changes.

Signature and Date Required

X _____
Signature of Account Owner, Custodian (UGMA/UTMA Accounts), or Trustee Date

Print Name Here

Title (if other than an individual)

If the Account Owner is a trust and there is more than one trustee, the additional trustee must sign here.

X _____
Signature of Co-Trustee

Print Name Here Date



**Northern Trust
Securities, Inc.**
Distributor

UBT 529 Services a Division of
**UNION BANK
& TRUST COMPANY**
Program Manager