

Change of Investment Option **Form**

Return this Form to:

CollegeCounts 529 Fund P.O. Box 85290 Lincoln, NE 68501

Overnight Mail:

CollegeCounts 529 Fund 3560 South 48th Street Lincoln, NE 68506

Complete This Form With Your Financial Advisor

If you have questions, please call us at 866.529.2228,

Change Investment Portfolios.		Monday–Friday, 7 a.m. to 7 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):		
(Y in	The Investment Portfolios	elect one of the following)	
	B. Target Portfolios (If you've checked box B, <i>select</i> ☐ Fund 100 ☐ Fund 80 ☐ Fund 60 ☐ Fund 40	one of the following) ☐ 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	
	Bank Savings% Bank Savings 529 Portfolio	Domestic (U.S.) Equity Large-Cap	
	Money Market	% DFA U.S. Large Cap Value 529 Portfolio	
	% State Street U.S. Government Money Market 529 Portfolio	% Northern Funds Stock Index 529 Portfolio % T. Rowe Price Large-Cap Growth 529 Portfolio	
	Fixed Income		
	% PIMCO Short-Term 529 Portfolio	Mid-Cap	
	% Northern Funds Bond Index 529 Portfolio	% Northern Funds Mid Cap Index 529 Portfolio	
	% Fidelity Advisor Investment Grade Bond 529 Portfolio	Small-Cap	
	% PGIM Total Return Bond 529 Portfolio	% T. Rowe Price Small Cap Value 529 Portfolio	
	% American Century Short Duration Inflation Protection Bond 529 Portfolio	% Northern Funds Small Cap Index 529 Portfolio% T. Rowe Price QM U.S Small-Cap Growth Equity	
	% BlackRock High Yield Bond 529 Portfolio	529 Portfolio	
	% AB Global Bond 529 Portfolio	International Equity	
	Balanced	% Northern Funds International Equity Index 529 Portfolio	
	% T. Rowe Price Balanced 529 Portfolio Real Estate	% Neuberger Berman International Select 529 Portfolio	
		% DFA International Small Company 529 Portfolio	
	% DFA Real Estate Securities 529 Portfolio% Principal Global Real Estate Securities 529 Portfolio	% Vanguard Emerging Markets Select Stock 529 Portfolio	
	Commodities	527 . 3.00.0	
	% Credit Suisse Commodity Return Strategy 529 Port	folio	

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.

