brightdirections
Advisor-Guided 529 College Savings

Investment Change Form

Complete this form with your Financial Advisor to change Investment Portfolios.

Return this Form to:	**Overnight Mail:**
Bright Directions College Savings Program P.O. Box 82623 Lincoln, NE 68501	Bright Directions College Savings Program 1248 O Street, Suite 200 Lincoln, NE 68508

If you have questions, please call us at **866.722.7283,** Monday–Friday, 7 a.m. to 7 p.m. (Central).

1. Current Account Information

Account Number: _____

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

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

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

2. New Investment Portfolios

Check only one box: A, B, or C.

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

☐ Aggressive Portfolio ☐ Moderate Portfolio ☐ Conservative Portfolio

☐ Index Age-Based Moderate Portfolio (available in Fee Structure A, C & F)

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

☐ Fund 100 ☐ Fund 80 ☐ Fund 60 ☐ Fund 40 ☐ Fund 20 ☐ Fund 10 ☐ 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

Money Market

_____% Invesco Government & Agency 529 Portfolio

Fixed Income

_____% Fidelity Short-Term Bond Index 529 Portfolio

_____% Baird Short-Term Bond 529 Portfolio

_____% Fidelity U.S. Bond Index 529 Portfolio

_____% PGIM Core Bond 529 Portfolio

_____% American Beacon Garcia Hamilton Quality Bond 529 Portfolio

_____% iShares 0-5 Year TIPS Bond ETF 529 Portfolio

_____% BlackRock Inflation Protected Bond 529 Portfolio

_____% BlackRock High Yield Bond 529 Portfolio

_____% Credit Suisse Floating Rate High Income 529 Portfolio

_____% AB Global Bond 529 Portfolio

_____% Payden Emerging Markets Bond 529 Portfolio

International Equity

_____% Dodge & Cox International Stock 529 Portfolio

_____% Northern International Equity Index 529 Portfolio

_____% Invesco Oppenheimer International Growth 529 Portfolio

_____% DFA International Small Company 529 Portfolio

_____% BlackRock Emerging Markets 529 Portfolio

Balanced

_____% T. Rowe Price Balanced 529 Portfolio

Domestic (U.S.) Equity

_____% MFS Value 529 Portfolio

_____% T. Rowe Price Equity Income 529 Portfolio

_____% American Century Value 529 Portfolio

_____% Northern Stock Index 529 Portfolio

_____% Sit Dividend Growth 529 Portfolio

_____% American Century Growth 529 Portfolio

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

_____% T. Rowe Price Extended Equity Market Index 529 Portfolio

_____% BlackRock Mid-Cap Growth Equity 529 Portfolio

_____% Ariel Fund 529 Portfolio

_____% Northern Small Cap Value 529 Portfolio

_____% Northern Small Cap Index 529 Portfolio

_____% Delaware Small Cap Core 529 Portfolio

_____% Harbor Small Cap Growth 529 Portfolio

ESG/Sustainable Investing

_____% Calvert Equity 529 Portfolio

Real Estate

_____% DFA Real Estate Securities 529 Portfolio

_____% Principal Global Real Estate Securities 529 Portfolio

Global Infrastructure

_____% Virtus Duff & Phelps Global Infrastructure 529 Portfolio

2. New Investment Portfolios *(continued from previous page)*

If you've checked box C, the following Portfolios are available in Fee Structure F Accounts ONLY:

_____% Vanguard Short-Term Bond Index ETF 529 Portfolio

_____% Vanguard Total Bond Market Index ETF 529 Portfolio

_____% Vanguard Real Estate Index ETF 529 Portfolio

_____% Vanguard Global ex-U.S. Real Estate Index ETF 529 Portfolio

_____% Vanguard Mega Cap Value Index ETF 529 Portfolio

_____% Vanguard Mega Cap Index ETF 529 Portfolio

_____% Vanguard Mega Cap Growth Index ETF 529 Portfolio

_____% Vanguard Mid-Cap Value Index ETF 529 Portfolio

_____% Vanguard Mid-Cap Index ETF 529 Portfolio

_____% Vanguard Mid-Cap Growth Index ETF 529 Portfolio

_____% Vanguard Small-Cap Value Index ETF 529 Portfolio

_____% Vanguard Small-Cap Index ETF 529 Portfolio

_____% Vanguard Small-Cap Growth Index ETF 529 Portfolio

_____% Vanguard FTSE Developed Markets Index ETF 529 Portfolio

_____% Vanguard FTSE Emerging Markets Stock Index ETF 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.

I acknowledge that neither the principal contributed to an Account, nor earnings thereon, are guaranteed or insured by the Federal Deposit Insurance Corporation (except for the Bank Savings Underlying Investment) or any other governmental agency; are not guaranteed or insured by the State of Illinois, the Office of the Illinois State Treasurer, any other state, any agency, or instrumentality thereof, Union Bank and Trust Company, Northern Trust Securities, Inc. or any of their respective authorized agents or affiliates; and are subject to investment risk, including loss of principal.

Signature and Date Required

X _____

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

_____

Print Name Here

_____

Title (if an entity other than an individual is establishing the Account)

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

Michael W. Frerichs
Illinois State Treasurer
Trustee & Administrator

UBT Union Bank & Trust
Program Manager