brightdirections
Advisor-Guided 529 College Savings

Investment Change Form

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

Return this Form to:
Bright Directions College Savings Program
P.O. Box 82623
Lincoln, NE 68501

Overnight Mail:
Bright Directions College Savings Program
3560 South 48th Street
Lincoln, NE 68506

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

1. Current Account Information

Account Number: ____________________

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

Mobile Phone Number: ____________________ Secondary 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.

☐ **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 ☐ 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

Balanced

_______% T. Rowe Price Balanced 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

Domestic (U.S.) Equity

_______% MFS Value 529 Portfolio
_______% T. Rowe Price Equity Income 529 Portfolio
_______% American Century Value 529 Portfolio
_______% American Century Equity Growth 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

Real Estate

_______% DFA Real Estate Securities 529 Portfolio
_______% Principal Global Real Estate Securities 529 Portfolio

Socially Responsible

_______% Calvert Equity 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 deposit account 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 & Trust Company, Northern Trust Securities, Inc. or any of their respective authorized agents or affiliates, or the FDIC; 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