



# 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: \_\_\_\_\_ 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

**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

**ESG/Sustainable Investing**

\_\_\_\_\_ % Calvert Equity 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 Mid-Cap Value Index ETF 529 Portfolio                  |
| _____ % Vanguard Total Bond Market Index ETF 529 Portfolio             | _____ % Vanguard Mid-Cap Index ETF 529 Portfolio                        |
| _____ % Vanguard Real Estate Index ETF 529 Portfolio                   | _____ % Vanguard Mid-Cap Growth Index ETF 529 Portfolio                 |
| _____ % Vanguard Global ex-U.S. Real Estate Index ETF<br>529 Portfolio | _____ % Vanguard Small-Cap Value Index ETF 529 Portfolio                |
| _____ % Vanguard Mega Cap Value Index ETF 529 Portfolio                | _____ % Vanguard Small-Cap Index ETF 529 Portfolio                      |
| _____ % Vanguard Mega Cap Index ETF 529 Portfolio                      | _____ % Vanguard Small-Cap Growth Index ETF 529 Portfolio               |
| _____ % Vanguard Mega Cap Growth Index ETF 529 Portfolio               | _____ % Vanguard FTSE Developed Markets Index ETF<br>529 Portfolio      |
|  | _____ % Vanguard FTSE Emerging Markets Stock Index ETF<br>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