TD Ameritrade 529 College Savings Plan

Investment Option Change/Future Contribution Allocation Form

- Use this form to request your twice per calendar year Investment Option changes or to change your future contribution allocations.
- Complete **Section 2** to change your current Investment Options to new Investment Options. *(You can do this only twice per calendar year.)*
- Complete **Section 3** to change your allocation instructions for future contributions.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.

Forms can be downloaded from our website at **www.tdameritrade.com/collegesavings,** or you can call us to order any form — or request assistance in completing this form — at **1.877.408.4644** any business day from 8 a.m. to 8 p.m. Central time.

1.877.408.4644
8 a.m. to 8 p.m. Central time M-F

www.tdameritrade.com/collegesavings

tdameritrade@NEST529.com

Regular mailing address:
TD Ameritrade 529 College Savings Plan
P.O. Box 30278
Omaha, NE 68103-1378

Overnight mailing address:
TD Ameritrade 529 College Savings Plan
920 Main Street, Suite 900
Kansas City, MO 64105

1. Account information

Account Number

Name of Account Owner *(first, middle initial, last)*

Telephone Number *(In case we have a question about your Account.)*

Name of Beneficiary *(first, middle initial, last)*

2. Investment Option Change

- For each Investment Option you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the TD Ameritrade 529 College Savings Plan Program Disclosure Statement and Participation Agreement (Program Disclosure Statement), available at **www.tdameritrade.com/collegesavings,** for complete information on the investments' objectives, risks, charges and expenses that you are considering, before investing in them.

Remember: Federal law allows Account Owners to make two Investment Option changes each calendar year.

Note: This change applies only to the assets currently held in your Account; it will not affect the allocation of your future investments.

Exchange FROM			**Investment Option**	**Exchange TO**
All		*Percentage*	**Age-Based Investment Options**	
☐	**OR**	☐☐ %	Age-Based Aggressive	☐☐☐ %
☐	**OR**	☐☐ %	Age-Based Growth	☐☐☐ %
☐	**OR**	☐☐ %	Age-Based Index	☐☐☐ %
			Static Investment Options	
☐	**OR**	☐☐ %	All Equity	☐☐☐ %
☐	**OR**	☐☐ %	Growth	☐☐☐ %
☐	**OR**	☐☐ %	Moderate Growth	☐☐☐ %
☐	**OR**	☐☐ %	Balanced	☐☐☐ %
☐	**OR**	☐☐ %	Conservative	☐☐☐ %
			Individual Investment Options	
☐	**OR**	☐☐ %	State Street S&P 500® Index	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard Total Stock Market Index	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard Russell 1000 Value Index	☐☐☐ %
☐	**OR**	☐☐ %	T. Rowe Price Large Cap Growth	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard Equity Income	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard Extended Market Index	☐☐☐ %
☐	**OR**	☐☐ %	Tributary Small Company	☐☐☐ %
☐	**OR**	☐☐ %	iShares Russell 2000 Growth ETF	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard FTSE Index	☐☐☐ %
☐	**OR**	☐☐ %	State Street MSCI® ACWI ex USA Index	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard FTSE Emerging Markets ETF	☐☐☐ %
☐	**OR**	☐☐ %	DFA World ex-US Government Fixed Income	☐☐☐ %
☐	**OR**	☐☐ %	MetWest Total Return Bond	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard Total Bond Market Index	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard Short-Term Bond Index	☐☐☐ %
☐	**OR**	☐☐ %	Vanguard Short-Term Inflation-Protected Index	☐☐☐ %
☐	**OR**	☐☐ %	Goldman Sachs Financial Square℠ Government Money Market	☐☐☐ %
				1 0 0 %

3. Allocation instructions for future contributions

- If you have added additional Investment Options in **Section 2**, please be sure that the allocations below reflect the correct Investment Options.
- Your future contributions will be invested in the Investment Options indicated below; it will not affect assets currently held in your account.

Age-Based Investment Options	
Age-Based Aggressive	%
Age-Based Growth	%
Age-Based Index	%
Static Investment Options	
All Equity	%
Growth	%
Moderate Growth	%
Balanced	%
Conservative	%
Individual Investment Options	
State Street S&P 500® Index	%
Vanguard Total Stock Market Index	%
Vanguard Russell 1000 Value Index	%
T. Rowe Price Large Cap Growth	%
Vanguard Equity Income	%
Vanguard Extended Market Index	%
Tributary Small Company	%
iShares Russell 2000 Growth ETF	%
Vanguard REIT Index	%
State Street MSCI® ACWI ex USA Index	%
Vanguard FTSE Emerging Markets ETF	%
DFA World ex-US Government Fixed Income	%
MetWest Total Return Bond	%
Vanguard Total Bond Market Index	%
Vanguard Short-Term Bond Index	%
Vanguard Short-Term Inflation-Protected Index	%
Goldman Sachs Financial Square℠ Government Money Market	%
	100 %

DO NOT STAPLE

4. Signature — YOU MUST SIGN BELOW

- I certify that I have read, understand, consent, and agree to all the terms and conditions of the Program Disclosure Statement and understand the rules and regulations of the TD Ameritrade College Savings Plan as they relate to this Investment Option Change/ Future Contribution Allocation request.
- By signing below, I authorize the Program Manager or its designees to change my Investment Options and/or my allocations for future contributions according to the instructions above.
- If the Account is owned by an entity or trust, I certify that I am authorized to act on its behalf in making this request. If the Account is a minor-owned Account or is funded with UGMA/UTMA assets, I further certify that I am the parent/guardian/custodian of the Account in question, and that the request is in the best interest of the Beneficiary.

SIGNATURE

Signature of Account Owner

☐☐ – ☐☐ – ☐☐☐☐

Date *(mm/dd/yyyy)*

Securities Products: Not FDIC Insured - No Bank Guarantee - May Lose Value

Nebraska Educational Savings Plan Trust, Issuer. First National Capital Markets, Inc., Distributor, Member FINRA, SIPC. TD Ameritrade, Inc., sub-administrator. First National Capital Markets and First National Bank of Omaha are affiliates.

Nebraska State Treasurer, Trustee

First National Bank Omaha

Program Manager