

Achieve Montana Exchange/Future Contribution (Allocation) Form



- You can exchange existing assets in, or change your future contributions to your Achieve Montana Account by completing this form, by telephone at **1.877.486.9271**, or online at **achievemontana.com**.
- Complete **Section 2** to exchange existing assets to a new Investment Option. (You can do this 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 below. Do not staple.

Forms can be downloaded from our website at **achievemontana.com**, or you can call us to order any form—or request assistance in completing this form—at **1.877.486.9271** any business day from 7 a.m. to 6 p.m. Mountain Time.

Return this form and any other required documents to:

Achieve Montana
P.O. Box 219448
Kansas City, MO 64121-9448

Phone Number: **1.877.486.9271**
Hours: **7 a.m. to 6 p.m. Mountain Time**
Monday through Friday
Website: **achievemontana.com**

1. Account information

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Account Number

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

Name of Joint Account Owner (If applicable) (first, middle initial, last)

 – –

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

Name of Beneficiary (first, middle initial, last)



2. Exchange instructions for existing assets

- For each Investment Option you hold and wish to exchange, tell us the percentage of assets you want moved and where you want the assets invested.
- You must allocate at least **5%** per Portfolio.
- Your Investment Options must equal **100%**.
- See the Achieve Montana Program Description (Program Description), *available at achievemontana.com*, for complete information on the Investment Options you are considering.
- These Investment Options are designed to help you save for post-secondary qualified higher education expenses.

Remember: Federal law allows Account Owners to make up to two exchanges 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
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All	Percentage		
Year of Enrollment			
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2041 Enrollment Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2038 Enrollment Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2035 Enrollment Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2032 Enrollment Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2029 Enrollment Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2026 Enrollment Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	2023 Enrollment Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	College Portfolio
Asset Allocation Option			
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Aggressive Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Growth Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Moderate Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Conservative Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Income Portfolio
Individual Portfolios Options			
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Equity Index Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Bond Index Portfolio
<input type="checkbox"/>	OR	<input type="text"/> <input type="text"/> %	Capital Preservation Portfolio
			TOTAL
			<input type="text"/> <input type="text"/> <input type="text"/> %

3. Allocation instructions for future contributions

- Your future contributions will be invested in the Investment Options you select until you change them, which can be done at any time.
- Before choosing your Investment Option(s), see the Disclosure Statement, *available at achievemontana.com*, for complete information about the Investment Options offered.
- These Investment Options are designed to help you save for post-secondary qualified higher education expenses.

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

Year of Enrollment

2041 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2038 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2035 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2032 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2029 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2026 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
2023 Enrollment Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
College Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

Asset Allocation Option

Aggressive Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderate Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

Individual Portfolios Options

Equity Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Bond Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Capital Preservation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

TOTAL %

4. Signature — YOU MUST SIGN BELOW

I/We authorize the exchange of assets in my/our Account to the Investment Option(s) I/we selected in **Section 2** and/or the allocation of my/our future contributions to the Investment Option(s) I/we selected in **Section 3**. I/We certify that I/we have read and understand, consent, and agree to all the terms and conditions of the Program Description and understand the rules and regulations governing Achieve Montana.

SIGNATURE

Signature of Account Owner

□□ — □□ — □□□□

Date (mm/dd/yyyy)

SIGNATURE

Signature of Joint Account Owner (If applicable)

□□ — □□ — □□□□

Date (mm/dd/yyyy)