Achieve Montana

Exchange/Future Contribution (Allocation) Form

ACHIEVE MONTANA
THEIR TOMORROW STARTS TODAY

- 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

☐☐☐☐☐☐☐☐☐ – ☐☐
Account Number

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

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

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

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

MT EXCHANGE

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
All		*Percentage*		
Year of Enrollment				
☐	**OR**	☐☐ %	2044 Enrollment Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	2041 Enrollment Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	2038 Enrollment Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	2035 Enrollment Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	2032 Enrollment Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	2029 Enrollment Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	College Portfolio	☐☐☐ %
Asset Allocation Option				
☐	**OR**	☐☐ %	Aggressive Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Growth Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Moderate Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Conservative Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Income Portfolio	☐☐☐ %
Individual Portfolios Options				
☐	**OR**	☐☐ %	Equity Index Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Bond Index Portfolio	☐☐☐ %
☐	**OR**	☐☐ %	Capital Preservation Portfolio	☐☐☐ %
			TOTAL	**1 0 0 %**

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

2044 Enrollment Portfolio	☐☐☐ %
2041 Enrollment Portfolio	☐☐☐ %
2038 Enrollment Portfolio	☐☐☐ %
2035 Enrollment Portfolio	☐☐☐ %
2032 Enrollment Portfolio	☐☐☐ %
2029 Enrollment Portfolio	☐☐☐ %
College Portfolio	☐☐☐ %

Asset Allocation Option

Aggressive Portfolio	☐☐☐ %
Growth Portfolio	☐☐☐ %
Moderate Portfolio	☐☐☐ %
Conservative Portfolio	☐☐☐ %
Income Portfolio	☐☐☐ %

Individual Portfolios Options

Equity Index Portfolio	☐☐☐ %
Bond Index Portfolio	☐☐☐ %
Capital Preservation Portfolio	☐☐☐ %
TOTAL	**1 0 0 %**

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)*

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Date *(mm/dd/yyyy)*

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