



# Investment Change Form

Complete This Form to Change Investment Portfolios.

### Return this Form to:

Bright Start College Savings Program  
P.O. Box 85298  
Lincoln, NE 68501

### Overnight Mail:

Bright Start College Savings Program  
6811 South 27th Street  
Lincoln, NE 68512

If you have questions, please call us at **877.432.7444**, Monday–Friday, 7 a.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. Investment Portfolio Selection Check only one box: A or B.

(Your initial and future contribution(s) will be invested based on your following selection, unless directed otherwise.)

### A. Age-Based Portfolios (If you've checked box A, select one of the following strategies)

#### Index Strategy

(Invests in Vanguard mutual funds)

- Index Aggressive Age-Based Portfolio
- Index Moderate Age-Based Portfolio
- Index Conservative Age-Based Portfolio

#### Multi-Firm Strategy

(Invests in multiple mutual fund families)

- Aggressive Age-Based Portfolio
- Moderate Age-Based Portfolio
- Conservative Age-Based Portfolio

### B. Target Portfolios and Individual Fund Portfolios (If you've checked box B, select any of the following [must total 100%, only whole percentages allowed])

#### Index Strategy

(Invests in Vanguard mutual funds)

- \_\_\_\_\_ % Index Equity Portfolio
- \_\_\_\_\_ % Index Balanced Portfolio
- \_\_\_\_\_ % Index Fixed Income Portfolio

#### Money Market

- \_\_\_\_\_ % Vanguard Federal Money Market 529 Portfolio

#### Fixed Income

- \_\_\_\_\_ % Baird Short-Term Bond 529 Portfolio
- \_\_\_\_\_ % Vanguard Short-Term Inflation-Protected Securities Index 529 Portfolio
- \_\_\_\_\_ % Vanguard Total Bond Market Index 529 Portfolio
- \_\_\_\_\_ % Dodge & Cox Income 529 Portfolio
- \_\_\_\_\_ % Vanguard Total International Bond Index 529 Portfolio

#### Real Estate

- \_\_\_\_\_ % Vanguard Real Estate Index 529 Portfolio

#### Multi-Firm Strategy

(Invests in multiple mutual fund families)

- \_\_\_\_\_ % Equity Portfolio
- \_\_\_\_\_ % Balanced Portfolio
- \_\_\_\_\_ % Fixed Income Portfolio

#### Domestic (U.S.) Equity

- \_\_\_\_\_ % DFA U.S. Large Cap Value 529 Portfolio
- \_\_\_\_\_ % Vanguard 500 Index 529 Portfolio
- \_\_\_\_\_ % Vanguard Total Stock Market Index 529 Portfolio
- \_\_\_\_\_ % T. Rowe Price Large-Cap Growth 529 Portfolio
- \_\_\_\_\_ % Ariel 529 Portfolio
- \_\_\_\_\_ % DFA U.S. Targeted Value 529 Portfolio
- \_\_\_\_\_ % Vanguard Explorer Portfolio

#### International Equity

- \_\_\_\_\_ % Vanguard Total International Stock Index 529 Portfolio
- \_\_\_\_\_ % DFA International Small Company 529 Portfolio

\_\_\_\_\_ Above percentages = 100%

### 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.

Investment changes are allowed twice per calendar year or upon a change of beneficiary.

#### Signature and Date Required

X \_\_\_\_\_  
Signature of Account Owner, Custodian (UGMA/UTMA Accounts), or Trustee Date

\_\_\_\_\_  
Print Name Here

\_\_\_\_\_  
Title (if other than an individual)

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



**Michael W. Frerichs**  
ILLINOIS STATE TREASURER  
Trustee & Administrator

**UBT**  
Union Bank & Trust  
Program Manager