ScholarShare College Savings Plan
Transfer Among Investment Portfolios Form

Questions? Call toll-free 1.800.544.5248
Or write to the Plan at P.O. Box 219185 Kansas City, MO 64121-9185
Visit www.ScholarShare529.com

- You can rebalance funds among Investment Portfolios within your Account twice per calendar year (or upon a change in Beneficiary to a Member of the Family). A rebalance of funds to or from an account in another Plan in the Network for the same Beneficiary will be considered a rebalance among Investment Portfolios for purposes of this restriction.
- Print in capital letters using blue or black ink, sign and date the form and mail it to the Plan at the above address.

1 Account Information *(You must provide complete information.)*

Plan Account Number

1	2	3	4	5	6	7	8	9			

Telephone Number

5	5	5	-	1	1	1	-	2	2	2	2

Participant Name (First, MI, Last, Suffix or Entity Name)

Sam Sample

Participant Email Address

sample@email.com

Designated Beneficiary Name (First, MI, Last, Suffix)

Fred Sample

2 Transfer Instructions *(You must complete this section.)*

This transfer instruction applies only to assets currently in your account; it will not change your allocation instructions for future contributions.

- For a FULL TRANSFER, enter the dollars, write the word “ALL” or indicate the percentage in the “Annual Transfer From” column.
- For a PARTIAL transfer, enter the dollars or percentages in the “Annual Transfer From” column.

Then, enter a percentage next to your selected Investment Portfolio(s) in the “Annual Transfer TO” column. The total amount in the “Annual Transfer From” column will be applied your Investment Portfolio(s) using the percentage(s) appearing in the “Annual Transfer To” column.

Note: If you’re closing an investment portfolio and do not want future contributions made to that portfolio, please establish or change your allocation instructions on the following page.

Rebalance FROM *(in Dollars OR percentage)*		Investment Portfolio Name *(Investment Portfolio Code)*	Rebalance TO *(percentage only)*	Check if new Investment Portfolio[1]
Dollars or ALL	**Percentage**			
ALL	%	Active Age-Based Portfolio	%	☐ New Portfolio
	%	Passive Age-Based Portfolio	%	☐ New Portfolio
	%	Active Diversified Equity Portfolio (2929)	%	☐ New Portfolio
	%	Active Growth Portfolio (2930)	50 %	☐ New Portfolio
	%	Active Moderate Growth Portfolio (2931)	%	☐ New Portfolio
	%	Active Conservative Portfolio (2932)	%	☐ New Portfolio
	%	Active International Equity Portfolio (2934)	50 %	☐ New Portfolio
	%	Active Diversified Fixed Income (2935)	%	☐ New Portfolio
	%	Passive Diversified Equity Portfolio (2945)	%	☐ New Portfolio
	%	Passive Growth Portfolio (2946)	%	☐ New Portfolio
	%	Passive Moderate Growth Portfolio (2947	%	☐ New Portfolio
	%	Passive Conservative Portfolio (2948)	%	☐ New Portfolio

[1] If a new Investment Portfolio is opened, a different portfolio number will be assigned and new investment coupons will accompany your confirmation statement. You can also use the Additional Contribution by Mail form to contribute by check at any time.

Rebalance FROM *(in Dollars OR percentage)*		Investment Portfolio Name *(Investment Portfolio Code)*	Rebalance TO *(percentage only)*	Check if new Investment Portfolio[2]
Dollars or ALL	**Percentage**			
	%	Passive Diversified Fixed Income Portfolio (2949)	%	☐ New Portfolio
	%	Index International Equity Portfolio (2951)	%	☐ New Portfolio
	%	Social Choice Portfolio (2933)	%	☐ New Portfolio
	%	Index Bond Portfolio (2950	%	☐ New Portfolio
	%	Index U.S. Large Cap Equity Portfolio (2952)	%	☐ New Portfolio
	%	Index U.S. Equity Portfolio (2953)	%	☐ New Portfolio
	%	Principal Plus Interest Portfolio (2954)	%	☐ New Portfolio
		TOTAL	**100%**	

Note: If you're closing an investment portfolio and do not want future contributions made to that portfolio, please establish or change your allocation instructions below.

☐ **Use my current allocation instructions on file for future contributions.**

■ **Establish or Change my allocation instructions as indicated below for my future contributions.**

- **Use a whole percentage next to each Investment Portfolio below. The TOTAL of all allocations must total 100%.**
- **The Plan will apply these allocations instructions to future Automatic Contribution Plan (ACP) contributions.**
- **These allocation instructions will not apply to payroll contributions, if any.**

You can view or change your Allocation Instructions online, by telephone or by form at any time.

Investment Portfolios	Whole Percentage *(per Investment Portfolio)*
Active Age-Based Portfolio	%
Passive Age-Based Portfolio	%
Active Diversified Equity Portfolio (2929)	%
Active Growth Portfolio (2930)	50 %
Active Moderate Growth Portfolio (2931)	%
Active Conservative Portfolio (2932)	%
Active International Equity Portfolio (2934)	50 %
Active Diversified Fixed Income (2935)	%
Passive Diversified Equity Portfolio (2945)	%
Passive Growth Portfolio (2946)	%
Passive Moderate Growth Portfolio (2947	%
Passive Conservative Portfolio (2948)	%
Passive Diversified Fixed Income Portfolio (2949)	%
Index International Equity Portfolio (2951)	%
Social Choice Portfolio (2933)	%
Index Bond Portfolio (2950	%
Index U.S. Large Cap Equity Portfolio (2952)	%

[2] If a new Investment Portfolio is opened, a different portfolio number will be assigned.

Index U.S. Equity Portfolio (2953)	%
Principal Plus Interest Portfolio (2954)	%
TOTAL	**100%**

3 Systematic Exchange (optional)

You may automatically reallocate funds from one or more investment option(s) to one or more different investment option(s) on a periodic basis on a date selected by you, by completing this section. The systematic exchange will begin upon receipt and acceptance of this Form in good order, on the exchange day selected below. If the exchange day is a weekend or holiday, the exchange will occur on the next business day. If an exchange frequency of quarterly is selected, the systematic exchanges will occur in March, June, September and December. Semi-Annual exchanges will take place in June and December. Annual exchanges will take place in December.

Exchange Frequency

☐ Monthly	☐ Quarterly	☐ Semi-Annually	☐ Annually

Source investment Option	Recipient investment Option	Dollar Amount

Exchange Date (Select date between 1st and 31st)

Stop Date	

Establishing, stopping or altering your Systematic Exchange will be considered one of the two account reallocations allowed per year. Systematic exchanges may be stopped or altered by completing a Rebalance Form located online at www.ScholarShare529.com or by contacting the Plan at 1.800.544.5248

4 Signature and Authorization *(This section must be signed for this change to take effect.)*

By signing this form,

- I authorize the transfer of assets in my account per my instructions, and if applicable, any allocation instruction change made on this form which will be applied to all future contributions **excluding my payroll deduction contributions, if any.**
- I certify that I read and understand the Plan Disclosure Booklet and the information provided here is true, complete, and accurate.
- I understand that this annual transfer of funds will become effective upon the Plan's receipt of this form in good order.
- I certify that I am the Participant or the Custodian, or I have the authority to act as the Participant.

Signature of Participant *Date (mm/dd/yyyy)*

Mail this form to:

Overnight Mail
ScholarShare College Savings Plan
430 W 7th Street Suite 219185
Kansas City, MO 64105-1407

Regular Mail
ScholarShare College Savings Plan
P.O. Box 219185
Kansas City, MO 64121-9185

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