

BRIGHTER FUTURE
529 ADVISOR PLAN

- Forms can be downloaded from our website at **www.BrighterFutureAdvisor529.com**, or you can call us to order any form – or request assistance in completing this form at **1.888.529.9552** any business day from 8:30 a.m. to 6:30 p.m. ET.

Brighter Future Advisor Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

Name of Designated 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 1% of your exchange amount to each investment option that you choose. Use whole percentages only.)*
- See the Brighter Future Advisor Plan Program Description (available at www.BrighterFutureAdvisor529.com) for complete information on the investment options you are considering.
- Remember:** Federal law allows account owners to make two investment 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
<i>All</i>		Year-of-Enrollment Portfolios	
☐	OR	iShares College Portfolio	%
☐	OR	iShares 2027 College Portfolio	%
☐	OR	iShares 2030 College Portfolio	%
☐	OR	iShares 2033 College Portfolio	%
☐	OR	iShares 2036 College Portfolio	%
☐	OR	iShares 2039 College Portfolio	%
☐	OR	iShares 2042 College Portfolio	%
		Asset Allocation Portfolios	
☐	OR	iShares Aggressive Portfolio	%
☐	OR	iShares Moderate Portfolio	%
☐	OR	iShares Conservative Portfolio	%
☐	OR	iShares Fixed Income Portfolio	%
		Custom iShares Portfolios	
☐	OR	iShares Russell 1000 Portfolio	%
☐	OR	iShares Russell 2000 Portfolio	%
☐	OR	iShares Core S&P Total U.S. Stock Market Portfolio	%
☐	OR	iShares Core High Dividend Portfolio	%
☐	OR	iShares Core U.S. REIT Portfolio	%
☐	OR	iShares Core MSCI EAFE Portfolio	%
☐	OR	iShares MSCI Emerging Markets ex-China Portfolio	%
☐	OR	iShares Edge MSCI Min Vol Emerging Markets Portfolio	%
☐	OR	iShares Core U.S. Aggregate Bond Portfolio	%
☐	OR	iShares TIPS Bond Portfolio	%
☐	OR	iShares 20+ Year Treasury Bond Portfolio	%
☐	OR	iShares Short Treasury Bond Portfolio	%
☐	OR	iShares 1-5 Year Investment Grade Corp Bond Portfolio	%
☐	OR	iShares iBoxx \$ Investment Grade Corporate Bond Portfolio	%
☐	OR	iShares iBoxx \$ High Yield Corporate Bond Portfolio	%
		Savings Portfolio	
☐	OR	Savings Portfolio	%
TOTAL			1 0 0 %

3. Allocation Instructions for Future Contributions

- Your future contributions, which can be updated at any time, will be invested in the investment options you select until you change them.
- Before choosing your investment option, see the Brighter Future Advisor Plan Program Description (available at www.BrighterFutureAdvisor529.com) for complete information about the investment options offered.
- You must allocate at least 1% of your contributions to each investment option that you choose. Use whole percentages only.

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 Portfolios:

iShares College Portfolio

iShares 2027 College Portfolio

iShares 2030 College Portfolio

iShares 2033 College Portfolio

iShares 2036 College Portfolio

iShares 2039 College Portfolio

iShares 2042 College Portfolio

Share Class F Percentage

%

%

%

%

%

%

%

Asset Allocation Portfolios:

iShares Aggressive Portfolio

iShares Moderate Portfolio

iShares Conservative Portfolio

iShares Fixed Income Portfolio

%

%

%

%

Custom iShares Portfolios:

iShares Russell 1000 Portfolio

iShares Russell 2000 Portfolio

iShares Core S&P Total U.S. Stock Market Portfolio

iShares Core High Dividend Portfolio

iShares Core U.S. REIT Portfolio

iShares Core MSCI EAFE Portfolio

iShares MSCI Emerging Markets ex-China Portfolio

iShares Edge MSCI Min Vol Emerging Markets Portfolio

iShares Core U.S. Aggregate Bond

iShares TIPS Bond Portfolio

iShares 20+ Year Treasury Bond Portfolio

iShares Short Treasury Bond Portfolio

iShares 1-5 Year Investment Grade Corp Bond Portfolio

iShares iBoxx \$ Investment Grade Corporate Bond Portfolio

iShares iBoxx \$ High Yield Corporate Bond Portfolio

%

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%

%

%

%

%

%

Savings Portfolio

Savings Portfolio

%

TOTAL

%

4. Signature — YOU MUST SIGN BELOW

I authorize the exchange of assets in my account to the investment option(s) I selected in **Section 2** and/or the allocation of my future contributions to the investment option(s) I selected in **Section 3**. I certify that I have read and understand, consent and agree to all the terms and conditions of the Brighter Future Advisor Plan Program Description and Participation Agreement.



SIGNATURE

Signature of Account Owner

□□ — □□ — □□□□

Date (mm/dd/yyyy)