

START K12

- Forms can be downloaded from our website at **start.laregents.edu**, or you can call us to order any form—or request assistance in completing this form—at **1-855-836-5387** Monday through Friday 7 am - 7 pm CT. Terms used in this form not otherwise defined, have the same meaning as those terms used in the Louisiana START K12 Program Description Booklet.

For overnight delivery or registered mail, send to:

Louisiana START K12 Program
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

1. Account information

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Account Number

[illegible]

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

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

[illegible]

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.
- See the Description Booklet available at start.laregents.edu for complete information on the Investment Options you are considering.

Remember: Federal law allows Account Owners to make 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
<i>All</i>		Target Risk Portfolios	
☐	OR	%	K12 Aggressive Portfolio %
☐	OR	%	K12 Moderate Growth Portfolio %
☐	OR	%	K12 Conservative Growth Portfolio %
☐	OR	%	K12 Income Portfolio %
		Individual Portfolios	
☐	OR	%	K12 Short-Term Index Portfolio %
☐	OR	%	K12 Bond Index Portfolio %
☐	OR	%	K12 International Bond Portfolio %
☐	OR	%	K12 US Equity Index Portfolio %
☐	OR	%	K12 International Equity Index Portfolio %
		Capital Preservation	
☐	OR	%	K12 Capital Preservation Portfolio %
			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, read the Description Booklet available at **start.laregents.edu** for complete information about the Investment Options offered.

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

Target Risk Portfolios

K12 Aggressive Portfolio	%
K12 Moderate Growth Portfolio	%
K12 Conservative Growth Portfolio	%
K12 Income Portfolio	%

Individual Portfolios

K12 Short-Term Index Portfolio	%
K12 Bond Index Portfolio	%
K12 International Bond Portfolio	%
K12 US Equity Index Portfolio	%
K12 International Equity Index Portfolio	%

Capital Preservation

K12 Capital Preservation Portfolio	%
	1 0 0 %

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 Description Booklet.

SIGNATURE _____
Signature of Account Owner

— —
Date (mm/dd/yyyy)

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