




TD Ameritrade 529 College Savings Plan Investment Option Change/Future Contribution Allocation Form

- Use this form to request your twice per calendar year Investment Option changes or to change your future contribution allocations.
- Complete **Section 2** to change your current Investment Options to new Investment Options. *(You can do this only 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 listed. Do not staple.

Forms can be downloaded from our website at www.tdameritrade.com/collegesavings, or you can call us to order any form—or request assistance in completing this form—at **1.877.408.4644** any business day from 8 a.m. to 8 p.m. Central time.

 **1.877.408.4644**
8 a.m. to 8 p.m. Central time M-F

 **www.tdameritrade.com/collegesavings**

 **tdameritrade@NEST529.com**

Regular mailing address:
TD Ameritrade 529 College Savings Plan
P.O. Box 30278
Omaha, NE 68103-1378

Overnight mailing address:
TD Ameritrade 529 College Savings Plan
920 Main Street, Suite 900
Kansas City, MO 64105

1. Account information

Account Number

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

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

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



2. Investment Option Change

- For each Investment Option you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the TD Ameritrade 529 College Savings Plan Program Disclosure Statement and Participation Agreement (Program Disclosure Statement), available at www.tdameritrade.com/collegesavings, for complete information on the investments' objectives, risks, charges and expenses that you are considering, before investing in them.

Remember: Federal law allows Account Owners to make two Investment Option changes 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>	<i>Percentage</i>	Age-Based Investment Options		
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Age-Based Aggressive	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Age-Based Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Age-Based Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Age-Based Conservative	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Static Investment Options				
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Balanced Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Conservative	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Individual Investment Options				
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	State Street S&P 500® Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard Total Stock Market Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard Russell 1000 Value Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	T. Rowe Price Large Cap Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard Equity Income	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard Extended Market Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Tributary Small Company	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	iShares Russell 2000 Growth ETF	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard REIT Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	State Street MSCI® ACWI ex USA Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard FTSE Emerging Markets ETF	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	DFA World ex-US Government Fixed Income	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	MetWest Total Return Bond	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard Total Bond Market Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard Short-Term Bond Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Vanguard Short-Term Inflation-Protected Index	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Goldman Sachs Financial Square SM Government Money Market	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
				1 0 0 %

3. Allocation instructions for future contributions

- If you have added additional Investment Options in **Section 2**, please be sure that the allocations below reflect the correct Investment Options.
- Your future contributions will be invested in the Investment Options indicated below; it will not affect assets currently held in your account.

Age-Based Investment Options

Age-Based Aggressive	<input type="text"/> <input type="text"/> <input type="text"/> %
Age-Based Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Age-Based Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Age-Based Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %

Static Investment Options

Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %

Individual Investment Options

State Street S&P 500® Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Total Stock Market Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Russell 1000 Value Index	<input type="text"/> <input type="text"/> <input type="text"/> %
T. Rowe Price Large Cap Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Equity Income	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Extended Market Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Tributary Small Company	<input type="text"/> <input type="text"/> <input type="text"/> %
iShares Russell 2000 Growth ETF	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard REIT Index	<input type="text"/> <input type="text"/> <input type="text"/> %
State Street MSCI® ACWI ex USA Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard FTSE Emerging Markets ETF	<input type="text"/> <input type="text"/> <input type="text"/> %
DFA World ex-US Government Fixed Income	<input type="text"/> <input type="text"/> <input type="text"/> %
MetWest Total Return Bond	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Total Bond Market Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Short-Term Bond Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Short-Term Inflation-Protected Index	<input type="text"/> <input type="text"/> <input type="text"/> %
Goldman Sachs Financial Square SM Government Money Market	<input type="text"/> <input type="text"/> <input type="text"/> %

%

4. Signature — YOU MUST SIGN BELOW

- I certify that I have read, understand, consent, and agree to all the terms and conditions of the Program Disclosure Statement and understand the rules and regulations of the TD Ameritrade College Savings Plan as they relate to this Investment Option Change/ Future Contribution Allocation request.
- By signing below, I authorize the Program Manager or its designees to change my Investment Options and/or my allocations for future contributions according to the instructions above.
- If the Account is owned by an entity or trust, I certify that I am authorized to act on its behalf in making this request. If the Account is a minor-owned Account or is funded with UGMA/UTMA assets, I further certify that I am the parent/guardian/custodian of the Account in question, and that the request is in the best interest of the Beneficiary.

SIGNATURE

Signature of Account Owner

□□ — □□ — □□□□

Date (mm/dd/yyyy)

Securities Products: Not FDIC Insured - No Bank Guarantee - May Lose Value

Nebraska Educational Savings Plan Trust, Issuer. First National Capital Markets, Inc., Distributor, Member FINRA, SIPC. TD Ameritrade, Inc., sub-administrator. First National Capital Markets and First National Bank of Omaha are affiliates.

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Nebraska State Treasurer, Trustee

1 First National Bank Omaha

Program Manager