

Iowa Advisor 529 Plan Investment Option Reallocation Form

Complete this form to request an Investment Option change for your Iowa Advisor 529 Plan account. Investment changes are permitted twice per calendar year and upon a change in designated Beneficiary. If you would like help completing this application, contact your financial advisor or call **1-800-774-5127**. Information is also available online at www.iowaadvisor529.com.



1 ACCOUNT INFORMATION AND MAILING ADDRESS

To help ensure timely and accurate processing of this form, please print clearly.

Name of Account Owner, Custodian, or entity (first, middle initial, last), or entity		Social Security/taxpayer ID number	
U.S. residential street address	City	State	ZIP code
U.S. mailing address (if different than U.S. residential street address)	City	State	ZIP code
E-mail address	Daytime phone	Evening phone	
Name of designated Beneficiary (first, middle initial, last)	Social Security number	Date of birth (mm/dd/yyyy)	
Account number			

Note: If the address above is different than the address currently listed on our records, we will update all accounts for the Account Owner, Custodian, or entity. All future correspondence will be sent to the new address until you advise us otherwise. **Distributions to a new address will require your signature to be Medallion Guaranteed if requested within 30 days of the address change.**

2 EXCHANGE INSTRUCTIONS FOR EXISTING ASSETS

- Each account may hold only one of the Age-Based or Static Allocation Options; however, an account may hold multiple Single Fund Options.
- If the account assets are currently in one of the Age-Based or Static Allocation Options, you may elect to exchange into ONE of the other Age-Based or Static Allocation Options, or, into one or more of the Single Fund Options.
- The assets will remain in the Options you select until you exchange them into a new Investment Option.
- See the Iowa Advisor 529 Plan Program Description and Participation Agreement (Program Description), available at www.iowaadvisor529.com, for complete information on the Investment Options you are considering.

Remember: Federal law allows Participants to make two exchanges each calendar year.

Exchanging into one of the Age-Based or Static Allocation Options will also change future contributions within this account to the same Option.

Age-Based Investment Strategy*
Select only one of the Age-Based Options

Exchange FROM		Exchange TO
<input type="checkbox"/> Iowa Advisor 529 Age-Based Option (Beneficiary's Current Age)	<input type="checkbox"/>
<input type="checkbox"/> Iowa Advisor 529 Age-Based Option (Hypothetical Age _____)	<input type="checkbox"/>

**Age-Based Options are designed for college savings and may not be appropriate for K-12 time horizons.*

Static Allocation Investment Strategy
Select only one of the Static Allocation Options

<input type="checkbox"/> Iowa Advisor 529 Aggressive Option	<input type="checkbox"/>
<input type="checkbox"/> Iowa Advisor 529 Growth Option	<input type="checkbox"/>
<input type="checkbox"/> Iowa Advisor 529 Moderate Option	<input type="checkbox"/>
<input type="checkbox"/> Iowa Advisor 529 Conservative Option	<input type="checkbox"/>

This section continues on the next page

4 ACCOUNT AGREEMENT AND SIGNATURE(S)

I certify that the information I have provided on this form—and all future information I will provide with respect to my Iowa Advisor 529 Plan account—is true, complete, and correct. By submitting this investment change request, I represent that I have not exceeded my investment change limit this calendar year. I have received and agree to the terms set forth in the Program Description and Participation Agreement and on this form. I understand that any individuals authorized to act on my original account will be assigned to and have authority in the same capacity on my new account.

To initiate any change, you must sign and date here.

x _____
Signature of Account Owner, Custodian or Trustee/Executor Print name Date

x _____
Signature of Co-Trustee or Co-Executor (if applicable) Print name Date

5 MAILING INSTRUCTIONS

REGULAR MAIL

Iowa Advisor 529 Plan
c/o Voya Investment Management
PO Box 9659
Providence, RI 02940-9659

OVERNIGHT/COURIER

Iowa Advisor 529 Plan
c/o Voya Investment Management
4400 Computer Drive
Westborough, MA 01581-1722

Iowa Advisor 529 Plan is a part of the Iowa Educational Savings Plan Trust, a state-sponsored 529 college savings plan administered by the State of Iowa, for which the Treasurer of the State of Iowa serves as the Trustee. Voya Investment Management Co. LLC provides investment management and administrative services for the Iowa Advisor 529 Plan. Shares in the Program are distributed by Voya Investments Distributor, LLC, Member FINRA/SIPC.



NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE