



# Change of Investment Option Form

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[PlanForCollegeNow.com](http://PlanForCollegeNow.com)  
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**Instructions:** The Account Owner is permitted to change the selected investment portfolio once per calendar year or upon a change of beneficiary. You may not use this form to change the beneficiary. Please complete all sections and return to the address above.

## Section 1. Account Information

**Account Number** \_\_\_\_\_

### Account Owner

### Beneficiary

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone Number

## Section 2. NEW Investment Option

Your total account balance will be transferred to, and all future contributions will be invested in, the option(s) that you select below. If you have any questions about the Portfolios, please consult the Enrollment Handbook.

**Check only one box (A, B or C)**

### A. Age-Based Portfolios

If you have checked box A, select one of the following:

Age-Based Aggressive

Age-Based Growth

Age-Based Balanced

Age-Based Conservative

### B. Target Portfolios

If you have checked box B, select one of the following:

**Fund 100** 100% Equity Funds

**Fund 80** 80% Equity Funds  
5% Real Estate Funds  
15% Fixed Income Funds

**Fund 60** 60% Equity Funds  
5% Real Estate Funds  
26% Fixed Income Funds  
9% Money Market Funds

**Fund 40** 40% Equity Funds  
5% Real Estate Funds  
36% Fixed Income Funds  
19% Money Market Funds

**Fund 20** 20% Equity Funds  
5% Real Estate Funds  
46% Fixed Income Funds  
29% Money Market Funds

**Conservative** 50% Fixed Income Funds  
50% Money Market Funds



### C. Individual Fund Portfolios

Each Individual Fund Portfolio will invest in a single mutual fund. Since each Portfolio invests in a single fund, the performance of each Portfolio is dependent upon the performance of the underlying single fund. As a result, the Individual Fund Portfolios may be more volatile than the Age-Based or Target Portfolios. You may select any combination of the following Portfolios. Please complete what percentage of your initial and future contributions you would like to be invested in each Individual Fund Portfolio. Selections must be in whole percentages.

<b>MONEY MARKET 529 PORTFOLIO:</b>  _____ % Vanguard Prime Money Market 529 Portfolio	<b>DOMESTIC EQUITY 529 PORTFOLIOS: (cont.)</b>  _____ % Vanguard Total Stock Market Index 529 Portfolio _____ % Vanguard FTSE Social Index 529 Portfolio _____ % American Century Equity Income 529 Portfolio _____ % Vanguard Mid-Cap Index 529 Portfolio _____ % Vanguard Extended Market Index 529 Portfolio _____ % Vanguard Small-Cap Value Index 529 Portfolio _____ % Vanguard Small-Cap Index 529 Portfolio _____ % Vanguard Small-Cap Growth Index 529 Portfolio
<b>FIXED INCOME 529 PORTFOLIOS:</b>  _____ % Vanguard Short-Term Bond Index 529 Portfolio _____ % Vanguard Intermediate-Term Bond Index 529 Portfolio _____ % Vanguard Instl. Total Bond Market Index 529 Portfolio _____ % PIMCO Total Return 529 Portfolio	
<b>REAL ESTATE 529 PORTFOLIO:</b>  _____ % Goldman Sachs Real Estate Securities 529 Portfolio	
<b>DOMESTIC EQUITY 529 PORTFOLIOS:</b>  _____ % Vanguard Value Index 529 Portfolio _____ % Vanguard Institutional Index 529 Portfolio _____ % Vanguard Growth Index 529 Portfolio _____ % Fidelity Advisor Equity Growth 529 Portfolio	<b>INTERNATIONAL EQUITY 529 PORTFOLIOS:</b>  _____ % Fidelity Advisor Diversified International 529 Portfolio _____ % Vanguard Total International Stock Index 529 Portfolio

**100% TOTAL**

Each investment option is described in more detail in the College Savings Plan of Nebraska Enrollment Handbook  
**Investment Products: Not FDIC Insured, No Bank Guarantee, May Lose Value**

### Section 3. Authorization

I hereby request the change of investment option(s) indicated. **I understand that my total account balance will be transferred to, and all future contributions will be invested into, the option selected above.** The College Savings Plan of Nebraska is entitled to rely on this request and is released from any and all claims I may have or hereafter assert with respect to the investment change. I certify that all information contained herein is true and correct.

Original signature required. Please allow approximately 5 business days for this change to be completed.

**X**  
\_\_\_\_\_  
Signature of Account Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Print Name Here)