

Investment Change Form

Complete this form to Change
Investment Options

Return this Form to:

Bloomwell 529
P.O. Box 85529
Lincoln, NE 68501-5529

Overnight Mail:

Bloomwell 529
1248 O Street, Suite 200
Lincoln, NE 68508

If you have questions, please call us at **877.408.4644**,
Monday–Friday, 7 a.m. to 7 p.m. (CT).

1. Account Information

Account Number: _____

Account Owner Name (First, M.I., Last): _____

Mobile Phone Number: _____

Beneficiary Name (First, M.I., Last): _____

Beneficiary Date of Birth (MM/DD/YYYY): _____

2. Investment Option Selection Must total 100%, only whole percentages allowed.

Your account balance and future contributions will be invested based on your following selection, unless directed otherwise. **NOTE:** You can only change your investments twice per calendar year or whenever you change the Beneficiary.

Age-Based Investment Options (Age-Based Investment Options automatically adjust as the Beneficiary gets older.)

_____ % Age-Based Core

_____ % Age-Based Socially Aware

Static Investment Options

_____ % Core All Equity

_____ % Socially Aware All Equity

_____ % Core Aggressive

_____ % Socially Aware Aggressive

_____ % Core Growth

_____ % Socially Aware Growth

_____ % Core Balanced

_____ % Socially Aware Balanced

_____ % Core Moderate

_____ % Socially Aware Moderate

_____ % Core Conservative

_____ % Socially Aware Conservative

_____ % Bank Savings

Individual Fund Investment Options

Money Market

_____ % Goldman Sachs Financial Square
Government Money Market 529

Fixed Income

_____ % Vanguard Short-Term Bond Index 529

_____ % Vanguard Short-Term Inflation-Protected
Securities Index 529

_____ % Vanguard Total Bond Market
Index 529

_____ % MetWest Total Return Bond 529

_____ % DFA World ex U.S. Government Fixed
Income 529

Domestic (U.S.) Equity

_____ % State Street S&P 500® Index 529

_____ % Vanguard Total Stock Market Index 529

_____ % Vanguard Equity Income 529

_____ % Vanguard Russell 1000 Value Index 529

_____ % T. Rowe Price Large-Cap Growth 529

_____ % Vanguard Extended Market Index 529

_____ % Vanguard Russell 2000 Growth Index 529

_____ % iShares Core S&P Small-Cap ETF 529

International Equity

_____ % State Street MSCI® ACWI ex USA Index 529

_____ % Vanguard Emerging Markets Stock Index 529

Real Estate

_____ % Vanguard Real Estate Index 529

Above percentages = 100%

3. Authorization

I hereby authorize and direct the change of Investment Options to the investments I selected in Section 2.

I acknowledge that my total Account balance and all future contributions will be invested in the Investment Option(s) selected above. I certify that all the information contained herein is true and correct and that I have read the Program Disclosure Statement and understand the rules and requirements governing investment changes.

I acknowledge, except for any investments made by a Plan participant in the Bank Savings Underlying Investment up to the limit provided by the Federal Deposit Insurance Corporation ("FDIC") insurance, neither the principal contributed to an Account nor earnings thereon are guaranteed or insured by the State of Nebraska, the Nebraska State Treasurer, the Nebraska Investment Council, the Trust, the Plan, any other state, any agency or instrumentality thereof, Union Bank and Trust Company, the FDIC, or any other entity. Investment returns are not guaranteed. Account Owners assume all investment risk, including the potential loss of principal.

Signature and Date Required

X

Signature of Account Owner, Custodian (UGMA/UTMA Accounts), or Trustee

Date

Print Name Here

Title (if other than an individual)



UBT
Union Bank & Trust
Program Manager

Nebraska Educational Savings Plan Trust, Issuer. Nebraska State Treasurer, Trustee. Nebraska Investment Council, Investment Oversight. Union Bank and Trust Company, Program Manager.