



Investment Change Form

Complete this form to Change Investment Options

Return this Form to:

NEST Direct 529
P.O. Box 83529
Lincoln, NE 68501-3529

Overnight Mail:

NEST Direct 529
1248 O Street, Suite 200
Lincoln, NE 68508

If you have questions, please call us at **888.993.3746**, 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 designated Beneficiary.

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

Index Strategy

(Invests in Vanguard mutual funds)

_____ % Age-Based Index Aggressive

_____ % Age-Based Index Moderate

_____ % Age-Based Index Conservative

Multi-Firm Strategy

(Invests in multiple mutual fund families)

_____ % Age-Based Aggressive

_____ % Age-Based Moderate

_____ % Age-Based Conservative

Static Investment Options

_____ % All Equity Static

_____ % Growth Static

_____ % Balanced Static

_____ % Conservative Static

_____ % Bank Savings Static

Individual Fund Investment Options

Money Market

_____ % Vanguard Federal 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 Equity 500 Index 529

_____ % Vanguard Total Stock Market Index 529

_____ % Vanguard Equity Income 529

_____ % T. Rowe Price Large-Cap Growth 529

_____ % Vanguard Extended Market Index 529

_____ % Vanguard Explorer 529

_____ % DFA U.S. Small Cap Value 529

International Equity

_____ % Vanguard Total International Stock Index 529

Real Estate

_____ % Vanguard Real Estate Index 529

Above percentages = 100%

3. Authorization

I hereby authorize and direct the change of Investment Option(s) 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 an Account Owner in the Bank Savings Static Investment Option up to the limit provided by 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.