



## 2. Select your new Learning Quest 529 Plan Portfolio

See the Learning Quest 529 Plan Guide and Participation Agreement (Guide), available at [schwab.com/learningquest](http://schwab.com/learningquest), for complete information on the Investment Portfolios available.

### Age-Based Track:

You can choose from three risk tracks based on your investment objectives and risk tolerance. As your Designated Beneficiary gets older, your assets will move to a progressively more conservative portfolio.

### Static Portfolio:

You can choose from nine portfolios depending on your investment objectives, risk tolerance, and time horizon. Each portfolio is reallocated annually to maintain its target asset allocation, and contributions stay in the portfolio you choose until you change your portfolio selection or until the Account is closed.

**Note:** This change applies only to the assets held in your Account; it will not affect the allocation of your future contributions. If you want future contributions to be directed to a new portfolio(s), you must complete both **Sections 2** and **3**.

### Select from the Age-Based Tracks and Static Portfolios below:

#### Age-Based Track

- Aggressive    %
- Moderate    %
- Conservative    %

#### Static Portfolios

- 100% Equity    %
  - 90% Equity    %
  - 70% Equity    %
  - 60% Equity    %
  - 50% Equity    %
  - 30% Equity    %
  - 20% Equity    %
  - Short-Term    %
  - Cash and Cash Equivalents    %
- 
- 1 0 0** %

### 3. Allocation instructions for future contributions

Complete the following to direct how your future contributions are to be invested.

**A. Please check one box below:**

If you do not complete this section, your allocation percentages will NOT be changed. Thus, your future contributions will continue to be invested in the existing portfolio(s), not the portfolio(s) you selected in **Section 2**.

- Direct all new contributions to the same allocations percentages selected in **Section 2**. *(no further action is necessary in Section 3)*
- Direct all new contributions to the allocation percentages selected below *(complete Section 3B)*.

**B. Complete this section only if you want to direct your future contributions to a different portfolio(s) than what you selected in Section 2.**

**Age-Based Track:**

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**Static Portfolio:**

You can choose from nine portfolios depending on your investment objectives, risk tolerance, and time horizon. Each portfolio is reallocated annually to maintain its target asset allocation, and contributions stay in the portfolio you choose until you change your portfolio selection or until the Account is closed.

**Select from the Age-Based Tracks and Static Portfolios below:**

**Age-Based Track**

- Aggressive    %
- Moderate    %
- Conservative    %

**Static Portfolios**

- 100% Equity    %
- 90% Equity    %
- 70% Equity    %
- 60% Equity    %
- 50% Equity    %
- 30% Equity    %
- 20% Equity    %
- Short-Term    %
- Cash and Cash Equivalents    %

%

### 4. Signature — YOU MUST SIGN BELOW

Learning Quest 529 Plan Account Owners, Responsible Individual or Custodian must sign this form.

I authorize the change of investment in my Account to the Investment Portfolio(s) I selected in **Section 2** and/or the allocation of my future contributions to the Investment Option(s) I selected in **Section 3**. I certify that I have read and understand, consent, and agree to all the terms and conditions of the Guide, and understand the rules and regulations governing the Learning Quest 529 Plan.

SIGNATURE

Signature of Account Owner/Responsible Individual/Custodian/Trustee(s)

-   -

Date (mm/dd/yyyy)

SIGNATURE

Signature of Joint Account Owner

-   -

Date (mm/dd/yyyy)