

# 529 College Savings Plan Investment Instructions

Use this form to change how your future contributions are invested or to make an exchange of the contributions and earnings currently invested in your state-sponsored, Fidelity-managed 529 College Savings Plan account. **Return the completed form to Fidelity Investments, College Plan Service Center, PO Box 770001, Cincinnati, OH 45277-0015.** If you have any questions, call us anytime at **800.544.1914** or visit us at **Fidelity.com**.

## 1 CUSTOMER INFORMATION

Participant's Name	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> <span style="font-size: 1.2em; font-weight: bold;">6</span> <span style="border: 1px solid black; width: 20px; height: 20px; display: inline-block; vertical-align: middle;"></span> <span style="border: 1px solid black; width: 20px; height: 20px; display: inline-block; vertical-align: middle;"></span> <span style="font-size: 1.2em; font-weight: bold;">-</span> <span style="border: 1px solid black; width: 20px; height: 20px; display: inline-block; vertical-align: middle;"></span> <span style="border: 1px solid black; width: 20px; height: 20px; display: inline-block; vertical-align: middle;"></span> <span style="border: 1px solid black; width: 20px; height: 20px; display: inline-block; vertical-align: middle;"></span> <span style="border: 1px solid black; width: 20px; height: 20px; display: inline-block; vertical-align: middle;"></span> <span style="border: 1px solid black; width: 20px; height: 20px; display: inline-block; vertical-align: middle;"></span> </div>
Participant's Social Security or Tax ID Number	Beneficiary Name
Beneficiary Social Security or Taxpayer ID Number	Beneficiary's Date of Birth (mm/dd/yyyy)

## 2 FUTURE CONTRIBUTIONS

I do NOT wish to change my future contributions.  
**IF YOU WISH TO MAKE A CHANGE FOR A ONE-TIME CONTRIBUTION OR ALL FUTURE CONTRIBUTIONS, SELECT ONE OF THE FOLLOWING:**

- Please change instructions for **THIS INVESTMENT ONLY**. (You must complete Section 4.)
- Change instructions for **ALL FUTURE** contributions.

You can invest your 529 College Savings Plan contributions based on one of four options detailed below.

**Choose one option only.**

- Age-Based Portfolios (Fidelity Funds)** are designed to generate returns that attempt to beat a major market index over the long term. These portfolios invest solely in Fidelity funds that are managed by dedicated portfolio managers who are making investment decisions backed by Fidelity's proprietary investment research.
- Age-Based Portfolios (Fidelity Index)** are designed to generate returns that closely mirror the performance of a major market index over the long term. These portfolios invest solely in Fidelity Index funds, and are able to keep transaction costs and other expenses low because they are passively managed. This means that the securities currently held in the respective index determine your investments.
- Age-Based Portfolios (Multi-Firm)** like our Fidelity Fund Portfolios, are designed to generate returns that attempt to beat a major market index over the long term and are managed by dedicated portfolio managers at Fidelity. These provide an opportunity to diversify your funds across multiple fund companies.
- Custom Strategy—(Use increments of 5%)**

**Create your own investment mix from any of the 529 College Savings Plan Portfolios below.**

Age-Based Portfolio (Fidelity Funds)	_____	%
Age-Based Portfolio (Fidelity Index)	_____	%
Age-Based Portfolio (Multi-Firm)	_____	%
Aggressive Growth Portfolio (Fidelity Funds) <sup>2</sup>	_____	%
Moderate Growth Portfolio (Fidelity Funds) <sup>3</sup>	_____	%
Conservative Portfolio (Fidelity Funds)	_____	%
Aggressive Growth Portfolio (Fidelity Index) <sup>2</sup>	_____	%
Moderate Growth Portfolio (Fidelity Index) <sup>3</sup>	_____	%
Conservative Portfolio (Fidelity Index)	_____	%
Spartan <sup>®</sup> 500 Index Portfolio	_____	%
Total Market Index Portfolio	_____	%
International Index Portfolio	_____	%
Intermediate Treasury Index Portfolio	_____	%
Money Market Portfolio	_____	%
Bank Deposit Portfolio <sup>1</sup>	_____	%
<b>Total (must equal 100%)</b>	<b>_____</b>	<b>100%</b>

Please use increments of 5%.



**3****529 COLLEGE SAVINGS PLAN PORTFOLIO EXCHANGE**

Use this section to make a Portfolio exchange in your Fidelity-managed 529 College Savings Plan account. All previously invested money (contributions and earnings) in your account will be exchanged from the current Portfolio position(s) and reinvested per your instructions below. You may make an exchange of existing investments in your account *once* every calendar year for a given beneficiary and upon the change of the designated beneficiary of the account.

- I do NOT wish to make my yearly exchange at this time.
- I do wish to make my yearly exchange. Please follow instructions below.

You can invest your 529 College Savings Plan contributions based on one of four options detailed below.

**Choose one option only.**

- Age-Based Portfolios (Fidelity Funds)** are designed to generate returns that attempt to beat a major market index over the long term. These portfolios invest solely in Fidelity funds that are managed by dedicated portfolio managers who are making investment decisions backed by Fidelity's proprietary investment research.
- Age-Based Portfolios (Fidelity Index)** are designed to generate returns that closely mirror the performance of a major market index over the long term. These portfolios invest solely in Fidelity Index funds, and are able to keep transaction costs and other expenses low because they are passively managed. This means that the securities currently held in the respective index determine your investments.
- Age-Based Portfolios (Multi-Firm)** like our Fidelity Fund Portfolios, are designed to generate returns that attempt to beat a major market index over the long term and are managed by dedicated portfolio managers at Fidelity. These provide an opportunity to diversify your funds across multiple fund companies.
- Custom Strategy—(Use increments of 5%)**

Create your own investment mix from any of the 529 College Savings Plan Portfolios below.

Age-Based Portfolio (Fidelity Funds)	_____	%	Please use increments of 5%.
Age-Based Portfolio (Fidelity Index)	_____	%	
Age-Based Portfolio (Multi-Firm)	_____	%	
Aggressive Growth Portfolio (Fidelity Funds) <sup>2</sup>	_____	%	
Moderate Growth Portfolio (Fidelity Funds) <sup>3</sup>	_____	%	
Conservative Portfolio (Fidelity Funds)	_____	%	
Aggressive Growth Portfolio (Fidelity Index) <sup>2</sup>	_____	%	
Moderate Growth Portfolio (Fidelity Index) <sup>3</sup>	_____	%	
Conservative Portfolio (Fidelity Index)	_____	%	
Spartan® 500 Index Portfolio	_____	%	
Total Market Index Portfolio	_____	%	
International Index Portfolio	_____	%	
Intermediate Treasury Index Portfolio	_____	%	
Money Market Portfolio	_____	%	
Bank Deposit Portfolio <sup>1</sup>	_____	%	
<b>Total (must equal 100%)</b>	<b>_____</b>	<b>100%</b>	

<sup>1</sup>Although the underlying deposits are eligible for FDIC insurance, subject to applicable federal deposit insurance limits, the units of the Bank Deposit Portfolio are not insured or guaranteed by the FDIC or any other government agency. You are responsible for monitoring the total amount of your assets on deposit at the depository bank, including amounts held directly at the depository bank. All such deposits held in the same ownership capacity at the depository bank are subject to aggregation and to the current FDIC insurance coverage limitation of \$250,000. Please see a 529 fact kit for more details.

<sup>2</sup>Formerly known as 100% Equity Portfolio

<sup>3</sup>Formerly known as 70% Equity Portfolio

**4****CONTRIBUTING TO YOUR ACCOUNT**

To make a contribution to your Fidelity-managed 529 College Savings Plan account, check the boxes that apply. Your contributions will be invested according to your investment allocation instructions in Section 3.

I've enclosed a check for \$\_\_\_\_\_ made payable to **Fidelity Brokerage Services LLC**.

If you have a Fidelity nonretirement brokerage or mutual fund account, you may choose the following options. I instruct you to:

Transfer \$\_\_\_\_\_ (dollar amount) from my core account in my Fidelity brokerage account, number

-

Sell \$\_\_\_\_\_ (dollar amount) or \_\_\_\_\_ (shares) and transfer the proceeds from the following Fidelity **mutual fund**.

Fund name \_\_\_\_\_ My account number is \_\_\_\_\_

Fidelity mutual funds will be sold and subject to any applicable trading fees as is specified in the fund's prospectus. We require 100% of a trade's value in a new account.

**5****AUTHORIZATION AND SIGNATURE**

I hereby ratify these written instructions and any telephone instructions given pursuant to this authority and agree that neither the Plan nor Fidelity will be liable for any loss, liability, cost, or expense for acting upon such instructions. I understand that telephone calls to Fidelity may be recorded, and I consent to such tape recordings.

**X**

\_\_\_\_\_  
SIGNATURE OF PARTICIPANT/AUTHORIZED INDIVIDUAL

\_\_\_\_\_  
DATE (mm/dd/yyyy)

