Iowa Advisor 529 Plan Investment Option Reallocation Form

Complete this form to request an Investment Option change for your Iowa Advisor 529 Plan account. Investment changes are permitted twice per calendar year and upon a change in designated Beneficiary. If you would like help completing this application, contact your financial advisor or call **1-800-774-5127**. Information is also available online at **www.iowaadvisor529.com**.

IAdvisor 529
Michael L. Fitzgerald, Treasurer of State

1 Account Information and Mailing Address

To help ensure timely and accurate processing of this form, please print clearly.

Name of Account Owner, Custodian, or entity (first, middle initial, last), or entity ______ Social Security/taxpayer ID number ______

U.S. residential street address ______ City ______ State ______ ZIP code ______

U.S. mailing address (if different than U.S. residential street address) ______ City ______ State ______ ZIP code ______

E-mail address ______ Daytime phone ______ Evening phone ______

Name of designated Beneficiary (first, middle initial, last) ______ Social Security number ______ Date of birth (mm/dd/yyyy) ______

Account number ______

Note**: If the address above is different than the address currently listed on our records, we will update all accounts for the Account Owner, Custodian, or entity. All future correspondence will be sent to the new address until you advise us otherwise.* ***Distributions to a new address will require your signature to be Medallion Guaranteed if requested within 30 days of the address change.

2 Exchange Instructions for Existing Assets

- Each account may hold only one of the Age-Based or Static Allocation Options; however, an account may hold multiple Single Fund Options.
- If the account assets are currently in one of the Age-Based or Static Allocation Options, you may elect to exchange into ONE of the other Age-Based or Static Allocation Options, or, into one or more of the Single Fund Options.
- The assets will remain in the Options you select until you exchange them into a new Investment Option.
- See the Iowa Advisor 529 Plan Program Description and Participation Agreement (Program Description), available at www.iowaadvisor529.com, for complete information on the Investment Options you are considering.

Remember: Federal law allows Participants to make two exchanges each calendar year.

Exchanging into one of the Age-Based or Static Allocation Options will also change future contributions within this account to the same Option.

Age-Based Investment Strategy*

Select only one of the Age-Based Options

Exchange FROM		Exchange TO
☐	Iowa Advisor 529 Age-Based Option (Beneficiary's Current Age)	☐
☐	Iowa Advisor 529 Age-Based Option (Hypothetical Age ______)	☐

Age-Based Options are designed for college savings and may not be appropriate for K-12 time horizons.

Static Allocation Investment Strategy

Select only one of the Static Allocation Options

Exchange FROM		Exchange TO
☐	Iowa Advisor 529 Aggressive Option	☐
☐	Iowa Advisor 529 Growth Option	☐
☐	Iowa Advisor 529 Moderate Option	☐
☐	Iowa Advisor 529 Conservative Option	☐

This section continues on the next page

2 (CONTINUED) EXCHANGE INSTRUCTIONS FOR EXISTING ASSETS

Exchanging from one or more of the Single Fund Options into one of the Age-based or Static Allocation Options will also change future contributions within this account to the same Option.

Exchanging from one or more of the Single Fund Options into one or more of another Single Fund Option WILL NOT change the future contributions within this account.

Exchange FROM	Single Fund Investment Strategy *Multiple Single Fund Options may be selected*	Exchange TO
____ %	Voya Government Money Market Option	____ %
____ %	Voya Intermediate Bond Option	____ %
____ %	Voya International Index Option	Not Available
____ %	Voya Large Cap Growth Option	____ %
____ %	Voya Large Cap Value Option	____ %
____ %	Voya MidCap Opportunities Option	____ %
____ %	Voya Multi-Manager International Equity Option	____ %
____ %	Voya Multi-Manager Mid Cap Value Option	____ %
____ %	Voya Short Term Bond Option	____ %
____ %	Voya Small Company Option	____ %
____ %	Voya U.S. Stock Index Option	____ %
____ %	VY BlackRock Inflation Protected Bond Option	____ %
	TOTAL	1 0 0 %

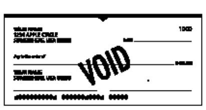
3 ACCOUNT OPTIONS

If you have existing Bank Instructions and/or an Automatic Investment Plan (AIP) and you wish to copy the option to the new allocation, please complete the section below. Please note, if you fund the Account via **Payroll Deduction**, you will need to complete a new Payroll Direct Deposit Authorization Form to direct contributions into the new allocation.

- ☐ I wish to **move** the Automatic Investment Plan (AIP) from the original Option to the new Option(s) selected in the following section.
- ☐ I wish to **stop** the Automatic Investment Plan (AIP).
- ☐ Please **copy** any Bank Instructions from the current Option to any new Options selected.

If you wish to make change to your AIP, please complete the following section.

To establish subsequent contribution options by Automatic Investment Plan (AIP) or Electronic Funds Transfer (EFT), your bank account registration MUST have one name in common with the Iowa Advisor 529 Plan Account Owner/Custodian.



Include a voided check if you are establishing an AIP or express purchase by EFT.

Note: Checks must be preprinted with your name and address. We cannot accept starter or counter checks.

Future AIP's into the Age-Based or Static Allocation Options may only be made into Options that the account currently holds.

☐ **Automatic Investment Plan (AIP)** - Automatic purchases can be made from your bank account into your Iowa Advisor 529 Plan account. There is a $50 minimum per investment, per account.

______________________	$ __________	______________________	$ __________
Option name	Amount	Option name	Amount

Investment frequency for all Options selected (choose one):

☐ **Monthly or semimonthly**, on the __________ and __________ day(s) of each month.

☐ **Periodically**, on the __________ and __________ day(s) of the month(s) indicated below.

☐ January	☐ February	☐ March	☐ April	☐ May	☐ June
☐ July	☐ August	☐ September	☐ October	☐ November	☐ December

This privilege will be effective upon receipt of valid bank information. *If no amount is chosen, your bank account will be debited $50 on the date(s) you have chosen. If no date is chosen, your account will be debited on the 25th day of the month. If the date falls on a weekend or holiday, your AIP purchase will occur on the next business day. If the next business day falls in the next month, the AIP will cycle on the previous business day.*

4 Account Agreement and Signature(s)

I certify that the information I have provided on this form—and all future information I will provide with respect to my Iowa Advisor 529 Plan account—is true, complete, and correct. By submitting this investment change request, I represent that I have not exceeded my investment change limit this calendar year. I have received and agree to the terms set forth in the Program Description and Participation Agreement and on this form. I understand that any individuals authorized to act on my original account will be assigned to and have authority in the same capacity on my new account.

To initiate any change, you must sign and date here.

✘ ______________________________ Signature of Account Owner, Custodian or Trustee/Executor

______________________________ Print name

______________ Date

✘ ______________________________ Signature of Co-Trustee or Co-Executor (if applicable)

______________________________ Print name

______________ Date

5 Mailing Instructions

Regular Mail

Iowa Advisor 529 Plan
c/o Voya Investment Management
PO Box 9659
Providence, RI 02940-9659

Overnight/Courier

Iowa Advisor 529 Plan
c/o Voya Investment Management
4400 Computer Drive
Westborough, MA 01581-1722

Iowa Advisor 529 Plan is a part of the Iowa Educational Savings Plan Trust, a state-sponsored 529 college savings plan administered by the State of Iowa, for which the Treasurer of the State of Iowa serves as the Trustee. Voya Investment Management Co. LLC provides investment management and administrative services for the Iowa Advisor 529 Plan. Shares in the Program are distributed by Voya Investments Distributor, LLC, Member FINRA/SIPC.

IAdvisor 529
Michael L. Fitzgerald, Treasurer of State