IAdvisor 529 Plan Investment Option Reallocation Form

Complete this form to request an Investment Option change for your IAdvisor 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.iadvisor529Plan.com.

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 IAdvisor 529 Plan Program Description and Participation Agreement (Program Description), available at www.iadvisor529Plan.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*

Exchange FROM	Select only one of the Age-Based Options	Exchange TO
☐	IAdvisor 529 Age-Based Option (Beneficiary's Current Age)	☐
☐	IAdvisor 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	Option	Exchange TO
☐	IAdvisor 529 Aggressive Option	☐
☐	IAdvisor 529 Growth Option	☐
☐	IAdvisor 529 Moderate Option	☐
☐	IAdvisor 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.

Single Fund Investment Strategy
Multiple Single Fund Options may be selected

Exchange FROM	Single Fund Investment Strategy	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 Duration Bond Option	%
%	Voya U.S. Stock Index Option	%
%	VY JPMorgan Small Cap Core Equity Option	%
	TOTAL	1 0 0 %

3 ACCOUNT OPTIONS

This AIP option 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.

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 IAdvisor 529 Plan Account Owner/ Custodian.

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 IAdvisor 529 Plan account. There is a $50 minimum per investment, per account. Please provide your bank information in Section 4.

Fund Option and/or Number	Amount	Start Month	Investment Date
________________	________	________	________

Frequency: ☐ Monthly ☐ Quarterly ☐ Semi-Annually ☐ Annually

Fund Option and/or Number	Amount	Start Month	Investment Date
________________	________	________	________

Frequency: ☐ Monthly ☐ Quarterly ☐ Semi-Annually ☐ Annually

4 Bank Information

How to find your banks ABA routing number...

↑ The ABA routing number can be found in the lower left corner of your personal check. The account number is just to the right of the ABA number.

Or, if you bank online, your bank will very likely provide easy access to the ABA number, once you are logged into your account.

To establish account options by EFT at any time, your bank account registration MUST have one name in common with the IAdvisory 529 Account Owner/Custodian. If a personal investment check is enclosed with this application we will use the information contained on the personal investment check to establish a requested AIP. The IAdvisor Program, Voya Investment Management Co. LLC, affiliates, and subcontractors - as well as the officers, directors, employees, and agents of these entities ("Program Manager") - will not be responsible for banking system delays beyond their control.

I understand that by executing this application, I herein authorize my bank to honor all entries to my bank account initiated through BNY Mellon Investment Servicing (U.S.) Inc., or any successor, on behalf of the applicable 529 plan. I acknowledge and understand that the Program Manager will not be liable for acting upon instructions believed genuine and in accordance with the procedures described in the Program Description and Participation Agreement or the rules of the Automated Clearing House. I further agree that any such authorization, unless previously terminated by my bank in writing, is to remain in effect until the Program Manager receives, and has a reasonable amount of time to act upon, a subsequent notice.

Bank Name ______________________ Bank's ABA routing number (typically 9 digits) ______________________

Account Registration (name(s) on account) ______________________ Account Number ______________________

5 Account Agreement and Signature(s)

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

I certify that the information I have provided on this form—and all future information I will provide with respect to my IAdvisor 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.

✘ ______________________ ______________________ ______________
Signature of Account Owner, Custodian or Trustee/Executor | Print name | Date

✘ ______________________ ______________________ ______________
Signature of Co-Trustee or Co-Executor (if applicable) | Print name | Date

6 Mailing Instructions

Regular Mail

IAdvisor 529 Plan
c/o Voya Investment Management
PO Box 534469
Pittsburgh, PA 15253-4469

Overnight/Courier

IAdvisor 529 Plan
Attention: 534469
500 Ross Street 154-0520
Pittsburgh, PA 15262

IAdvisor 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 IAdvisor 529 Plan. Shares in the Program are distributed by Voya Investments Distributor, LLC, Member FINRA/SIPC.

IAdvisor 529

NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE