

2. Current Investment Option change

- For each current Investment Option you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See **ablenow.com** for complete information on Investment Options.
- Your total Investment Option percentages in the "Exchange TO" column below must equal 100%. If the percentages do not equal 100%, your current allocation will remain the same.
- Exchanges to or from the Checking Account require two business days to be completed.
- Complete **Section 4** if the Checking Account option selected and the Account does not currently invest, or has not previously invested, in the Checking Account. **Important Note for Entities: Entities may not select the Checking Account unless they are opening the Account as agent under a power of attorney designated by an Account Owner with Legal Capacity.**

Remember: Internal Revenue Code Section 529A allows Account Owners to make up to two Investment Option changes each calendar year.

Note: This change applies only to the assets currently held in your Account; it will not affect the allocation of future contributions.

Exchange FROM		Investment Option	Exchange TO	
All	Percentage			
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Aggressive Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Moderate Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Conservative Income	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	FDIC Insured Savings Account	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
<input type="checkbox"/>	OR	<input type="checkbox"/> <input type="checkbox"/> %	Checking Account (Complete Section 4)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
				1 0 0 %

3. Allocation instructions for future contributions

- To change the Investment Option allocation of future Account contributions, indicate the new allocations below.
- Future contribution allocations will not affect assets currently held in the Account.
- The total Investment Option percentages must equal 100%. If the percentages do not equal 100%, current allocations for future contributions will remain the same.
- Exchanges to or from the Checking Account require two business days to be completed.
- Complete **Section 4** if the Checking Account is selected and the Account does not currently invest, or has not previously invested, in the Checking Account. **Important Note for Entities: Entities may not select the Checking Account unless they are opening the Account as agent under a power of attorney designated by an Account Owner with Legal Capacity.**

Aggressive Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Moderate Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Conservative Income	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
FDIC Insured Savings Account	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
Checking Account (Complete Section 4)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> %
1 0 0 %	

4. Checking Account Information

Required if the Checking Account is selected. (Complete if the Checking Account is selected in **Section 2 or 3** and the Account does not currently invest, or has not previously invested, in the Checking Account).

Account Owner's Identity Verification. (Required for an Account Owner who is an adult. This is not required for minors.)

Note: To help the government prevent the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an Account. Acceptable forms of identification include driver's license, state-issued I.D., military I. D. or passport.

Check this box if the Account Owner does not have a driver's license, state-issued I.D., military I.D., or passport. By checking this box you acknowledge that the Account Owner will not be able to select the Checking Account.

<input type="text"/>	<input type="text"/>	<input type="text"/>
Account Owner's driver's license, state-issued I.D. card, military I.D., or passport number (up to 15 digits)	State	Expiration date (mm/dd/yyyy)

Please check one: Driver's license State-issued I.D. Military I.D. Passport

Passport country of issue

Account Owner's mother's maiden name

Authorized Individual's Identity Verification. (Required)

Note: To help the government prevent the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens or assumes signature authority over an Account. Acceptable forms of identification include driver's license, state-issued I.D., military I.D. or passport.

Check this box if the Authorized Individual does not have a driver's license, state-issued I.D., military I.D., or passport. By checking this box you acknowledge that the Authorized Individual will not be able to select the Checking Account for the Account.

<input type="text"/>	<input type="text"/>	<input type="text"/>
Authorized Individual driver's license, state-issued I.D. card, military I.D., or passport number (up to 15 digits)	State	Expiration date (mm/dd/yyyy)

Please check one: Driver's license State-issued I.D. Military I.D. Passport

Passport country of issue

Authorized Individual's mother's maiden name

Optional Checking Account features:

(Optional) Check this box to receive a debit card with the Checking Account. There is no fee assessed to receive the debit card associated with the Checking Account. **Note:** For Accounts established by the Account Owner and Accounts where an Account Owner with Legal Capacity has designated an Authorized Individual as their agent under power of attorney, the debit card will be issued in the name of the Account Owner and mailed to the Account Owner's mailing address within 10 business days after the Checking Account is funded. For Accounts established by an Authorized Individual for a minor or an adult without Legal Capacity, the debit card will be issued in the name of the Authorized Individual and mailed to the Authorized Individual's mailing address. Contributions into the Checking Account will be available for withdrawal after 6-7 business days.

- Fees associated with the Checking Account, including the debit card, are found in the Fifth Third Terms and Conditions.
- Separate statements for the Checking Account will be provided by Fifth Third Bank. To update statement delivery preferences for the Checking Account, log onto www.53.com/ABLE after the debit card or confirmation of the deposit has been received.
- For Accounts managed by multiple Authorized Individuals for a minor or an adult without Legal Capacity, only one Authorized Individual will be permitted to access the Checking Account, and use the debit card if the Checking Account is selected. Note that ABLEnow may require submission of a separate release form or other instruments or documentation when an Account has multiple Authorized Individuals.

