

Important information about this form:

- Fill out this form to change the investment option on your ABLE for ALL Savings Plan account.
- You can only make two investment changes per calendar year.
- To make this change we'll have to sell the current investment and buy the new election; this process should take up to 5 business days.

Need help?

Give us a call Monday – Friday from 9am – 8pm ET at **1-844-394-2253**

Individuals with speech or hearing disabilities may dial **711** to access Telecommunications Relay Service (TRS) from a telephone or TTY.

Mail the form to:

ABLE for ALL Savings Plan
PO Box 534430
Pittsburgh, PA 15253- 4430

Overnight Mail:

ABLE for ALL Savings Plan
Attention: 534430
500 Ross Street, 154-0520
Pittsburgh, PA 15262

Fax:

833-286-8167

1 ABLE account information

Name of the Beneficiary on the ABLE account (First and last)

____ _ - ____ - ____
Beneficiary's Social Security or Taxpayer Identification Number

____ _ - ____ - ____
ABLE for ALL Savings Plan account number

2 Investment change instructions

These changes apply only to the assets currently in your account. In the “Reallocate funds FROM” section, please indicate the investment option with the corresponding dollar amount from which you are reallocating assets. In the “Reallocate funds TO” section, please indicate the investment option with the corresponding amount to which you are reallocating assets. If you’d like to complete reallocations from more than 3 portfolios, please submit multiple copies of this page of this form. All reallocations will be processed together and will only count as one investment change.

Please read the Oregon ABLE **Program Description & Participation Agreement** for important information about the cash and investment options before making a decision.

Reallocation #1

A Move funds FROM the following option:

 Portfolio name

Select one:

Partial amount

Liquidate this portfolio in full

\$ _____ , _____ . _____

B Move funds TO the following option(s):

ABLE Conservative \$ _____ , _____ . _____
 Amount

ABLE Moderate \$ _____ , _____ . _____
 Amount

ABLE Aggressive \$ _____ , _____ . _____
 Amount

Cash Option \$ _____ , _____ . _____
 Amount

\$ _____ , _____ . _____
 Total contribution amount

Reallocation #2

A Move funds FROM the following option:

 Portfolio name

Select one:

Partial amount

Liquidate this portfolio in full

\$ _____ , _____ . _____

B Move funds TO the following option(s):

ABLE Conservative

\$ _____ , _____ . _____
 Amount

ABLE Moderate

\$ _____ , _____ . _____
 Amount

ABLE Aggressive

\$ _____ , _____ . _____
 Amount

Cash Option

\$ _____ , _____ . _____
 Amount

\$ _____ , _____ . _____
 Total contribution amount

Reallocation #3

A Move funds FROM the following option:

 Portfolio name

Select one:

Partial amount

Liquidate this portfolio in full

\$ _____ , _____ . _____

B Move funds TO the following option(s):

ABLE Conservative

\$ _____ , _____ . _____
 Amount

ABLE Moderate

\$ _____ , _____ . _____
 Amount

ABLE Aggressive

\$ _____ , _____ . _____
 Amount

Cash Option

\$ _____ , _____ . _____
 Amount

\$ _____ , _____ . _____
 Total contribution amount

4 Sign the form

By signing below, I am agreeing to the terms and conditions set forth below and in the **Participation Agreement** contained in the **Plan Disclosure Booklet**. I understand and agree that those documents govern all aspects of this Account and are incorporated herein by reference.

I certify that all of the information provided by me on this form is, and all information provided by me in the future will be, true, complete and correct and I authorize the Plan to modify this Account's investment options/selections based upon this information.

Signature of Beneficiary or Authorized Legal Representative

Date (mm/dd/yyyy)