MI 529 Advisor Plan Change of Investment Form

- Use this form to request one of your twice per calendar year Investment Portfolio changes or to change your allocation for future contributions.
- Complete **Section 2** to perform and exchange from your current Investment Portfolio to new Investment Portfolio. (*You can do this only twice per calendar year.*)
- Complete **Section 3** to change your Investment Portfolio for future contributions into your account.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.

To request assistance in completing this form call us at **1.866.529.8818**, Monday to Friday 8:30 a.m. - 6 p.m. ET.



1.866.529.8818 Monday to Friday 8:30 a.m. - 6 p.m. ET

www.mi529advisor.com

Regular mailing address: MI 529 Advisor Plan P.O. Box 55847 Boston, MA 02205-5847

Overnight mailing address: MI 529 Advisor Plan 95 Wells Avenue, Suite 155 Newton, MA 02459

1. Current Account Information

Account Number
Account Owner or Trustee/Custodian or Entity (<i>First name</i>) (M.1.)
Account Owner or Trustee/Custodian or Entity (Last name)
Telephone Number
Beneficiary (First name)
Beneficiary (Last name)



2.

Exchange Current Investment Portfolio(s)

- For each Investment Portfolio you wish to change, indicate the percentage of assets you want moved and where you want the assets invested.
- See the MI 529 Advisor Plan Description, available at mi529advisor.com, for complete information on Investment Portfolios.
- Please select one or more Investment Portfolios from the choices below. If you choose to exchange into only one Investment Portfolio please indicate 100% next to that Portfolio. If you choose more than one Investment Portfolio please indicate the percentage amount of the assets you would like to invest into each of the selected Portfolios with the total equaling 100%.

Remember: Federal law allows Account Owners to make changes to your Investment Portfolios(s) twice per each calendar year. Note: This change applies only to the assets currently held in your Account. To update your Allocation Instructions for future contributions go to Section 3.

Exchange FROM			Investment Portfolio	Exchange TO
All		Percentage	Enrollment Year Investment Portfolios	
	OR	%	2042 / 2043 Enrollment Portfolio	<u> </u>
	OR	%	2040 / 2041 Enrollment Portfolio	<u> </u>
	OR	%	2038 / 2039 Enrollment Portfolio	<u> </u>
	OR	%	2036 / 2037 Enrollment Portfolio	<u> </u>
	OR	%	2034 / 2035 Enrollment Portfolio	<u> </u>
	OR	%	2032 / 2033 Enrollment Portfolio	%
	OR	%	2030 / 2031 Enrollment Portfolio	%
	OR	%	2028 / 2029 Enrollment Portfolio	<u> </u>
	OR	<u> </u>	2026 / 2027 Enrollment Portfolio	
	OR	%	In School Portfolio	
			Target Risk Portfolios	
	OR	%	Capital Appreciation Portfolio	%
	OR	%	Conservative Allocation Portfolio	<u> </u>
			Multi-Fund Portfolio	
	OR	%	Nuveen Alternative Income Portfolio	<u> </u>
			Individual Fund Portfolios	
	OR	%	Nuveen Large Cap U.S. Equity Index Portfolio	<u> </u>
	OR	%	Nuveen Dividend Growth Portfolio	<u> </u>
	OR	%	Nuveen Large Cap Value Portfolio	<u> </u>
	OR	%	Harbor Capital Appreciation Portfolio	<u> </u>
	OR	%	Ariel Portfolio	<u> </u>
	OR	%	Nuveen U.S. Small Cap Portfolio	<u> </u>
	OR	%	Harding Loevner Global Equity Portfolio	<u> </u>
	OR	%	Oakmark International Portfolio	<u> </u>
	OR	%	DFA Emerging Markets Portfolio	%
	OR	%	TCW MetWest Total Return Bond Portfolio	%
	OR	%	Nuveen Strategic Income Portfolio	%
	OR	%	Nuveen Inflation Linked Portfolio	<u> </u>
	OR	%	Nuveen Large Cap Responsible Equity Portfolio	
	OR	%	Nuveen Core Impact Bond Portfolio	
	OR	%	Nuveen Real Asset Income Portfolio	
	OR	%	Principal Plus Interest Portfolio	<u> </u>
			TOTAI	1 0 %
			TUTAI	

Note: Please review the MI 529 Advisor Plan Description for risks with Investment Portfolios.

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Allocation Instructions for Future Contributions

A. Please check one box below if you would like to update your allocation instructions for future contributions to your account:

If you do not complete this section, your allocation percentages will NOT be changed. Thus, your future contributions will continue to be invested in the existing Portfolio(s), not the Portfolio(s) you selected in **Section 2**.

- Direct all new contributions to the same allocation percentages selected in **Section 2**. (*No further action is necessary in Section 3)* Direct all new contributions to the allocation percentages selected below (*complete Section 3B*).
- B. Complete this section only if you want to direct your future contributions to a different Investment Portfolio(s) than
- what you selected in *Section 2*.

Please select only one Unit Class (Required).



Class C Class I

Enrollment Year Investment Portfolios:

The asset allocation of money invested in the Enrollment Year Investment Portfolios is automatically adjusted over time to become more conservative as the enrollment year approaches. The assets will remain in your selected Enrollment Portfolio until it merges with the In School Portfolio,* or unless you exchange an Enrollment Portfolio for another Enrollment Portfolio or any other Investment Portfolio.**

Target Risk Portfolios:

The assets will remain in your selected portfolio(s) unless you exchange your selection(s) for a different Investment Portfolio(s).*

Multi-Fund Portfolio:

The assets will remain in your selected portfolio unless you exchange your selection(s) for a different Investment Portfolio(s).*

Individual Fund Portfolios:

The assets will remain in your selected portfolio(s) until you update your Investment Portfolio.

2042 / 2043 Enrollment Portfolio 2040 / 2041 Enrollment Portfolio 2038 / 2039 Enrollment Portfolio 2036 / 2037 Enrollment Portfolio 2034 / 2035 Enrollment Portfolio 2032 / 2033 Enrollment Portfolio 2028 / 2029 Enrollment Portfolio 2026 / 2027 Enrollment Portfolio In School Portfolio

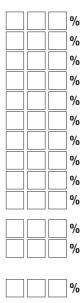
Capital Appreciation Portfolio Conservative Allocation Portfolio

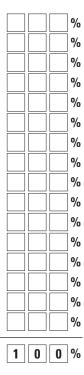
Nuveen Alternative Income Portfolio

Nuveen Large Cap U.S. Equity Index Portfolio Nuveen Dividend Growth Portfolio Nuveen Large Cap Value Portfolio Harbor Capital Appreciation Portfolio Ariel Portfolio Nuveen U.S. Small Cap Portfolio Harding Loevner Global Equity Portfolio

Oakmark International Portfolio

DFA Emerging Markets Portfolio TCW MetWest Total Return Bond Portfolio Nuveen Strategic Income Portfolio Nuveen Inflation Linked Portfolio Nuveen Large Cap Responsible Equity Portfolio Nuveen Core Impact Bond Portfolio Nuveen Real Asset Income Portfolio Principal Plus Interest Portfolio





Total

* See the Plan Description for details.

** Subject to the two permitted investment rebalances per calendar year.

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4. SIGNATURE — YOU MUST SIGN BELOW

By signing this form, I authorize the transfer of funds from my current Investment Portfolio(s) to the Investment Portfolio(s) indicated in Section 2 and I acknowledge the following:

- I understand a rebalance, or transfer of assets, among Investment Portfolios for my Account can only be requested twice per calendar year.
- If I am participating in Recurring Contribution, I understand my contributions will continue into my original Investment Portfolio(s) unless an updated Account Features Form accompanies this form.
- The purchased Units will retain the same holding-period characteristics as the redeemed Units with respect to any applicable CDSC (or, for Class C Units, future conversion to Class A Units).
- If Class A Units in the Principal Plus Interest Portfolio are exchanged for Units in another Investment Portfolio, the exchange will be subject to an initial sales charge unless an initial sales charge was previously paid on the Class A Units being exchanged.

I understand this rebalance, or transfer of assets will become effective upon the Plan's receipt of all required documentation in good order.

I certify that I am the Account Owner or the Trustee/Custodian, or I have the authority to act as the Account Owner.

SIGNATURE

Signature of Account Owner or Trustee/Custodian or Authorized Representative of Entity

Date (mm-dd-yyyy)					

