

MI529advisor

- 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.

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

* M | ADV | SOR | CHANGE OF | INVESTMENT *

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

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

3. 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 A ☐ 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.**

2042 / 2043 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2040 / 2041 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2038 / 2039 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2036 / 2037 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2034 / 2035 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2032 / 2033 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2030 / 2031 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2028 / 2029 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
2026 / 2027 Enrollment Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
In School Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

Target Risk Portfolios:

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

Capital Appreciation Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Conservative Allocation Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

Multi-Fund Portfolio:

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

Nuveen Alternative Income Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
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Individual Fund Portfolios:

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

Nuveen Large Cap U.S. Equity Index Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen Dividend Growth Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen Large Cap Value Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Harbor Capital Appreciation Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Ariel Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen U.S. Small Cap Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Harding Loevner Global Equity Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Oakmark International Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
DFA Emerging Markets Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TCW MetWest Total Return Bond Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen Strategic Income Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen Inflation Linked Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen Large Cap Responsible Equity Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen Core Impact Bond Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Nuveen Real Asset Income Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Principal Plus Interest Portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

Total %

* See the Plan Description for details.

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

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)

nuveen

A TIAA Company

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