



### 3 Rebalance amount TO each Investment Option <sup>2</sup>

Indicate the incoming rebalance amount in either dollars **OR** as a percentage of the **TOTAL** amount being transferred.

- If you indicate the amount in dollars, then the total amount below must equal the total amount in Section 2.
- If you indicate the amount in percentage, then the total allocation must equal 100%.

**Complete only 1 column below – either dollars or as a percentage.**

Investment Option Name	Indicate the Incoming Amount <i>(in dollars OR percentages)</i>		Is this a new Investment Option?
	Dollars	Percentage	
Managed Allocation Option	\$ , .	100.0 0%	<input checked="" type="checkbox"/> Yes OR <input type="checkbox"/> No
100% Equity Option (1918)	\$ , .	.0 0%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Balanced Option (2300)	\$ , .	.0 0%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
100% Fixed Income Option (2301)	\$ , .	.0 0%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Money Market Option (2302)	\$ , .	.0 0%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Guaranteed Option (1917)	\$ , .	.0 0%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
<b>Total INCOMING Amount</b>	\$ , .	<b>100.0 0%</b>	

### 4 Signature and Authorization *(This section must be signed for this change to take effect.)*

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

- I understand a rebalance, or transfer of assets, among Investment Options for my Account can only be requested once per calendar year. I have not requested a rebalance in this Account at any prior time during the current calendar year.
- If I am participating in the Automatic Contribution Plan (ACP), I understand my contributions will continue into my original Investment Option(s) unless an updated *Electronic Banking Information Form* accompanies this form.
- If I am making contributions by automatic payroll deduction, I understand my payroll contributions will continue into my original Investment Option(s) unless an updated *Payroll Deduction Form* accompanies this request or I notify my employer to stop my payroll deduction.

**For Entity Accounts** *e.g. Trusts, Estates, Business Entities, IRC 501(c)(3) Organizations, or State/Local governments.*

I certify I am authorized by the entity Account Owner identified in Section 2 to act on its behalf and I have attached the appropriate documentation to substantiate authorization for this transaction.

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

*John A Sample*

*January 20, 2009*

*Signature of Account Owner, Custodian or Authorized Representative of Entity*

*Date*

#### Rebalance Tips

- If you request your rebalance by telephone, any questions can be immediately answered by a knowledgeable representative and your transaction can be processed on the same day, if received prior to 4:00 p.m. ET.
- Rebalance using ALL or a percentage of your Account unless you want very specific amounts to be rebalanced FROM or TO a particular Investment Option. Then you won't unintentionally leave a small balance in your original Investment Option(s).
- Consider the effect of this rebalance on your payroll deductions or automatic contribution plans (ACP), if any. You'll need to tell us if you want to change those options in any way; otherwise they will continue in your previously designated Investment Option(s).
- Read the *Disclosure Booklet* or visit the Plan's web site for information about the Investment Options available in the Plan.
- **Questions?** Call toll free 1-877-338-4646 (Monday through Friday).

**Mail this form to:**

#### Overnight Mail

Minnesota College Savings Plan  
30 Dan Road  
Canton, MA 02021-2809

#### Regular Mail

Minnesota College Savings Plan  
P.O. Box 55134  
Boston, MA 02205-5134



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<sup>2</sup> Effective November 1, 2007, transfers (including transfers where there is a change of the Beneficiary) from the Guaranteed Option to the Money Market Option will not be permitted. If this restriction changes, you will be notified prior to the effective date of any such change.