



Investment Option or Allocation Change Form

Important information about this form:

- Fill out this form to change the allocation and/or the investment option on your Oregon ABLE Savings Plan account.
- You can only make two investment changes per calendar year.
- Future contributions and withdrawals will be allocated to help bring your account to your target allocation of cash and investment balances.
- 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 – 5pm PT at
1-844-999-2253 or
from 6am – 5pm PT at
1-844-888-2253 (TTY)

Mail the form to:

Oregon ABLE Savings Plan
P.O. Box 9891
Providence, RI 02940-8091

Overnight Mail:

Oregon ABLE Savings Plan
4400 Computer Drive
Westborough, MA 01581

1 ABLE account information

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

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

____ _ - ____ _ - ____ _ - ____ _
Oregon ABLE Savings Plan account number

2 Choose where to put your money

You can put your money in an investment and/or cash option. Future contributions and withdrawals will be allocated to help bring your account to your target allocation of cash and investment balances.

Please read the Oregon ABLE Savings **Plan Disclosure Booklet** for important information about the cash and investment options before making a decision.

If you decide to invest, you have to allocate at least 10% of your money to the investment.

With an investment allocation

- This portion of your money is usually set aside for longer term investment.
- There's the risk of losing money, even your contributions, but you may also gain money over time.
- Each option has varying degree of risk, going up and down in value depending on the market.
- It can take up to 5 – 7 business days to receive money once you start a withdrawal.
- Learn about the three portfolio options, ABLE Conservative, ABLE Moderate, and ABLE Aggressive in the **Plan Disclosure Booklet** before you pick one in the next step.

With a cash allocation

- This portion of your money is usually set aside for short term saving or on-going spending needs.
- There's low risk, but minimal or no interest.
- The account is FDIC insured up to the allowable amount.
- It can take up to 3 – 5 business days to receive money once you start a withdrawal.

How would you like to allocate your money?

(Must equal to 100%)

_____ %

Invested (Must be either 0% or at least 10%)

_____ %

Cash option

If you invested, fill out **Step 3**. If you chose not to invest and put all of your money in the cash allocation, you can skip to **Step 4**.

Still undecided about the cash and/or investment allocation?

Check out the question: "How transfers work?" in the FAQs section on www.OregonABLESavings.com for more information.

The investment information on this page has been provided by Sellwood Consulting, the investment advisor for the Oregon ABLE Savings Plan.

3 Select an investment option

Skip this step if you chose to put all of your money in the cash allocation.

There are three investment options to pick from. There are risks involved in investing, your decision should be based on your goals and timeline for this ABLE account. The rest is up to the market's performance.

For an in-depth look at each of the investment options, please refer to the Plan Disclosure Booklet.

How do you want to invest? (Please select one)

- ABLE Conservative**
This option seeks to provide current income and some growth by investing in a portfolio of mutual funds that consists of 20% global public stocks and 80% bonds. Overall, there's a small amount of risk and limited appreciation potential, designed for a shorter investment period.
- ABLE Moderate**
This option seeks to provide a combination of growth and current income by investing in a portfolio of mutual funds that consists of 50% global public stocks and 50% bonds. Overall, there's a medium level of risk for a pursuit of investment return, designed for a medium or uncertain time horizon.
- ABLE Aggressive**
This option provides the potential to grow by investing in a portfolio of mutual funds that consists of 84% global public stocks and 16% bonds. Overall, there's a high level of risk and potential for return (or loss), designed for a longer investment period (10 years or more).

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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 open this Account based upon this information.

Signature of Beneficiary or Authorized Legal Representative

Date (mm/dd/yyyy)