







**4. Investment Option selection** (Check A or B - continued on next page.)

- Before choosing your Investment Options, see the CollegeAdvantage Direct 529 Savings Plan *Offering Statement and Participation Agreement* (available at [www.CollegeAdvantage.com](http://www.CollegeAdvantage.com)) for complete information about the Investment Options offered. You must allocate at least **1%** of your contributions to each Investment Option you choose. Use whole percentages only.

A.  I want to keep the same investment allocation (s) for my new Beneficiary.

**Note:** If you are invested in an Age-Based Option(s) and the new Beneficiary is in a different age bracket than the former Beneficiary, your asset allocation may change.

If you wish to **keep the same investment allocations** and you have a **Fifth Third Certificate of Deposit**, please indicate the CD maturity below. Any CDs must be closed and re-opened under the new Beneficiary name. Please select one of the options below:

1.  Keep the same **TERM** of the original CD. Example: If the original CD Term was 12 months with 3 months left, you will purchase a 12-month Term CD.

**Note:** See the CollegeAdvantage Direct 529 Savings Plan *Offering Statement and Participation Agreement* (available at [www.CollegeAdvantage.com](http://www.CollegeAdvantage.com)) for complete information on the Investment Options you are considering.

2.  Keep the same **approximate MATURITY DATE** of the original CD. Example: If the original CD Term was 12 months with 3 months left, you will purchase a 3-month Term CD.

**Note:** When CD term changes, the associated APY changes as well.

(see next page for item 4B.)

**B.  I want to select new investment allocations or purchase a new Certificate of Deposit.**

**1. Investment Portfolios**

- You must allocate at least **1%** of your contributions to each Investment Option that you choose. Use whole percentages only.
- Your investment percentages must total **100%**.
- The assets will remain in the portfolio you select until you exchange them into a new Investment Option.

**Vanguard Ohio Target Enrollment Portfolios**

(Your investment mix automatically becomes more conservative as the beneficiary nears the target enrollment year.)

Vanguard Ohio Target Enrollment 2040/2041 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2038/2039 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2036/2037 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2034/2035 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2032/2033 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2030/2031 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2028/2029 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2026/2027 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2024/2025 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2022/2023 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Target Enrollment 2020/2021 Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Ohio Commencement Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

**Year of Enrollment Date Portfolios**

The asset allocation of money invested in the Year of Enrollment Date Portfolios is automatically adjusted over time to become more conservative as the Beneficiary approaches enrollment. Your assets will be automatically invested in the Year of Enrollment Date Portfolio that matches your Beneficiary's date of birth.

Advantage Age-Based Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
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**Ready-Made Risk-Based Portfolios**

Vanguard Aggressive Growth Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Growth Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Moderate Growth Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Conservative Growth Index Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Income Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %

**Individual Investment Options**

**MUTUAL FUND BASED OPTIONS**

**International Equity Options (Stocks)**

Dimensional Fund Advisors - World ex U.S. Core Equity Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Total International Stock Index Option	<input type="text"/> <input type="text"/> <input type="text"/> %

**U.S. Equity Options (Stocks)**

Vanguard Strategic Equity Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Extended Market Index Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard U.S. Growth Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Windsor II Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard 500 Index Option	<input type="text"/> <input type="text"/> <input type="text"/> %

**Balanced Option (Mix of Stocks and Bonds)**

Vanguard Wellington Option	<input type="text"/> <input type="text"/> <input type="text"/> %
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**Fixed Income Options (Bonds)**

Vanguard High Yield Corporate Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Dimensional Fund Advisors - DFA Investment Grade Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Total Bond Market Index Option	<input type="text"/> <input type="text"/> <input type="text"/> %
Vanguard Short-Term Inflation-Protected Securities Index Option	<input type="text"/> <input type="text"/> <input type="text"/> %

**Capital Preservation Option (Cash)**

Interest Accumulation Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> %
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**BANKING OPTIONS (Cash)  
(FDIC-insured to certain limits)**

Fifth Third 529 Savings Account	<input type="text"/> <input type="text"/> <input type="text"/> %
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**Total**  **1 0 0** %



