



Vermont Higher Education Investment Plan (VHEIP) Rebalance / Future Allocations Form

Return to: PO BOX 44002, Jacksonville, FL 32231
Overnight Mail: 9428 Baymeadows Rd, Ste 110, Jacksonville, FL 32256

- ▶ Complete this form to (1) request a rebalance of the assets in your account or (2) change the allocation of future contributions made to your account.
- ▶ **Note:** Failure to provide required information may result in a delay of processing your request.
- ▶ You can rebalance funds among Investment Portfolios within your account **twice per calendar year** and change the allocation of future contributions at **any time**.
- ▶ **Complete a separate form for each account.**
- ▶ **Questions?** Visit www.vheip.org or call us at **1-800-637-5860**.

1. ACCOUNT INFORMATION *(This is the current VHEIP account for which the change is being requested.)*

Account Number *(Required)*

Account Owner, Custodian, or Entity Name *(First, MI, Last, Suffix)*

Account Owner Last 4 Social Security Number
or Taxpayer Identification Number *(Required)*

Daytime Phone Number

Evening Phone Number

Beneficiary Name *(First, MI, Last, Suffix)*

2. WHAT DO YOU WANT TO DO?

Transfer invested funds from one portfolio to another. – Complete **Sections 3 and 5**

Change how my future contributions are invested. – Complete **Sections 4 and 5**

3. REBALANCE INSTRUCTIONS *(Complete this section to move existing assets from one investment to another.)*

Section 529 of the IRC allows you to transfer funds that have already been invested in your account from one investment portfolio to another **no more than twice per calendar year**. Once you have made two rebalance changes within the same calendar year, you may not make additional rebalance changes until January 1 of the next calendar year.

Transfer account assets to the investment portfolios indicated to the right.

Please select any one or combination of the investment portfolios listed below. You can verify and/or change your current investment portfolios and/or allocations by logging into your account at www.vheip.org.

VHEIP Managed Allocation Portfolio	<input type="text"/>	%
VHEIP Diversified Equity Portfolio	<input type="text"/>	%
VHEIP Equity Index Portfolio	<input type="text"/>	%
VHEIP Balanced Portfolio	<input type="text"/>	%
VHEIP Fixed Income Portfolio	<input type="text"/>	%
VHEIP Principal Plus Interest Option	<input type="text"/>	%
Total Allocations	<input type="text" value="100"/>	%

- ▶ Your total allocations must equal 100%
- ▶ Use whole number; no fractions.

4. FUTURE ALLOCATION INSTRUCTIONS

(Complete this section to change how your future contributions should be invested.)

Please select any one or combination of investment portfolios listed to the right. You can change allocations of future contributions at any time by logging into your account at www.vheip.org.

- ▶ Your total allocations must equal 100%.
- ▶ Use whole numbers; no fractions.
- ▶ Future contributions will be invested according to the allocation instructions you establish to the right.

VHEIP Managed Allocation Portfolio		%
VHEIP Diversified Equity Portfolio		%
VHEIP Equity Index Portfolio		%
VHEIP Balanced Portfolio		%
VHEIP Fixed Income Portfolio		%
VHEIP Principal Plus Interest Option		%
<hr/>		
Total Allocations	100	%

5. SIGNATURE & AUTHORIZATION *(This section must be signed.)*

By signing below, I am agreeing to the terms and conditions set forth below and in the Disclosure Booklet and Participation Agreement. I understand and agree that these documents govern all aspects of this account and are incorporated herein by reference.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner, and additionally that:

It is my intent to (1) request a rebalance of the assets in my account or (2) change the allocation of future contributions made to my account. I understand that under federal tax law asset rebalances must meet certain requirements that are summarized in the Disclosure Booklet and Participation Agreement.

If I am participating in the automatic contribution plan (ACP), I understand that my participation in ACP will continue unless an updated Automatic Contributions Plan / Electronic Funds Transfer Form accompanies this form. If I am making contributions by payroll deduction, I understand that my payroll contributions will continue as currently instructed unless an updated Payroll Deduction Form accompanies this request. I understand that I must notify my employer to stop or change the amount of my payroll deduction. I understand that at any time the value of my account(s) may be more or less than the amounts I contributed to such account(s).

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. I authorize the Plan to act on my instructions based upon this information. I have received, read and understand this form and the Disclosure Booklet, including the Participation Agreement. I understand that the Vermont Student Assistance Corporation may from time to time amend the Disclosure Booklet and Participation Agreement and I understand and agree that I will be subject to the terms of those amendments. If I am issuing instructions for an account in a representative capacity (e.g., as a Trustee of a Trust or pursuant to a Power of Attorney), I understand and acknowledge that I am assuming any responsibility for any adverse consequences resulting from my instructions. I further agree that neither VHEIP nor its agents will be liable for any loss, liability, cost or expense for acting upon these instructions, except to the extent required by applicable law.

Signature of Account Owner, Custodian or Authorized Representative of an Individual or Entity Account Owner

Date

The Vermont Higher Education Investment Plan (Plan) is administered by the Vermont Student Assistance Corporation (VSAC). Interests in the Plan are issued directly to Account Owners by VSAC. Intuition College Savings Solutions, LLC (Intuition) is the Plan Manager.

