

MFS 529 SAVINGS PLAN ADDITIONAL INVESTMENT FORM



1. Account Information

ACCOUNT OWNER'S FIRST NAME _____ MI _____ LAST NAME _____
 - -
 SOCIAL SECURITY NUMBER

BENEFICIARY'S FIRST NAME _____ MI _____ LAST NAME _____
 / /
 DATE OF BIRTH (MM/DD/YYYY) SOCIAL SECURITY NUMBER

ADDRESS _____

CITY _____ STATE _____ ZIP CODE _____

This is my new address; please update my account information.
 (Please check the box and sign only if applicable) ACCOUNT OWNER'S SIGNATURE _____

Note: If the new address is a non-U.S. address, you will be restricted from making additional purchases into this account.

REGISTERED REPRESENTATIVE'S NAME _____ REGISTERED REPRESENTATIVE'S PHONE NUMBER _____

2. List Individual Investment Options

Note: Purchases can also be made directly from your checking/savings account online.

Please visit mfs.com or contact the MFS 529 Savings Plan Service Team at 1-888-529-0063 Monday - Friday 8AM - 7PM ET.

FUND NUMBER	ACCOUNT NUMBER	FUND NAME/UNIT CLASS (example: Enrollment Option 2025 Class A)	AMOUNT
<input type="text"/>	_____	_____	\$ _____
<input type="text"/>	_____	_____	\$ _____
<input type="text"/>	_____	_____	\$ _____
<input type="text"/>	_____	_____	\$ _____

Total investment amount: \$ _____

Please make your investment check payable to the MFS Savings Plan and mail to:

Regular mail
 MFS 529 Savings Plan
 PO Box 534454
 Pittsburgh, PA 15253- 4454

Overnight mail
 MFS 529 Savings Plan
 Attention: 534454
 500 Ross Street, 154-0520
 Pittsburgh, PA 15262

Important Notes:

- There is no minimum additional investment amount for MFS 529 Savings Plan accounts.
- To establish a new fund within your existing type of account in the same unit class, write the word "NEW" in the space provided for the account number.
 - Minimum initial investment amounts to establish a NEW account is \$250 for 529 accounts.
 - Please read the Participant Agreement and Disclosure and consult your financial professional before investing in a **NEW** MFS 529 Savings Plan Investment Option.
- Please use more than one form if you have more than four additional investments.
- If you are investing in a new unit class, a new account application is required.
- Funds will be invested on the first business day of receipt as long as the investment instructions are completed in full.

MFS® 529 SAVINGS PLAN

INVESTMENT OPTIONS



CLASS A

Enrollment year investment options that correspond with the beneficiary's expected college enrollment date.

BIRTH RANGE	FUND NAME	FUND NUMBER
9/1/1999 TO 8/31/2000	ENROLLMENT YEAR 2018 FUND	1002
9/1/2000 TO 8/31/2001	ENROLLMENT YEAR 2019 FUND	1003
9/1/2001 TO 8/31/2002	ENROLLMENT YEAR 2020 FUND	1004
9/1/2002 TO 8/31/2003	ENROLLMENT YEAR 2021 FUND	1005
9/1/2003 TO 8/31/2004	ENROLLMENT YEAR 2022 FUND	1006
9/1/2004 TO 8/31/2005	ENROLLMENT YEAR 2023 FUND	1007
9/1/2005 TO 8/31/2006	ENROLLMENT YEAR 2024 FUND	1008
9/1/2006 TO 8/31/2007	ENROLLMENT YEAR 2025 FUND	1009
9/1/2007 TO 8/31/2008	ENROLLMENT YEAR 2026 FUND	1010
9/1/2008 TO 8/31/2009	ENROLLMENT YEAR 2027 FUND	1011
9/1/2009 TO 8/31/2010	ENROLLMENT YEAR 2028 FUND	1012
9/1/2010 TO 8/31/2011	ENROLLMENT YEAR 2029 FUND	1013
9/1/2011 TO 8/31/2012	ENROLLMENT YEAR 2030 FUND	1014
9/1/2012 TO 8/31/2013	ENROLLMENT YEAR 2031 FUND	1015
9/1/2013 TO 8/31/2014	ENROLLMENT YEAR 2032 FUND	1016
9/1/2014 TO 8/31/2015	ENROLLMENT YEAR 2033 FUND	1017
9/1/2015 TO 8/31/2016	ENROLLMENT YEAR 2034 FUND	1018
9/1/2016 TO 8/31/2017	ENROLLMENT YEAR 2035 FUND	1019
9/1/2017 TO 8/31/2018	ENROLLMENT YEAR 2036 FUND	1020
9/1/2018 TO 8/31/2019	ENROLLMENT YEAR 2037 FUND	1021
9/1/2019 TO 8/31/2020	ENROLLMENT YEAR 2038 FUND	1022
9/1/2020 TO 8/31/2021	ENROLLMENT YEAR 2039 FUND	1023
9/1/2021 TO 8/31/2022	ENROLLMENT YEAR 2040 FUND	1024
9/1/2022 TO 8/31/2023	ENROLLMENT YEAR 2041 FUND	1025
9/1/2023 TO 8/31/2024	ENROLLMENT YEAR 2042 FUND	1033

The following risk-based fund investments are also available.

RISK-BASED FUND NAME	FUND NUMBER
AGGRESSIVE GROWTH ALLOCATION FUND	1026
GROWTH ALLOCATION FUND	1027
MODERATE ALLOCATION FUND	1028
CONSERVATIVE ALLOCATION FUND	1029
LIFETIME INCOME FUND	1030
LIMITED MATURITY FUND	1031
US GOVT CASH RESERVE FUND	1032

MFS® 529 SAVINGS PLAN

INVESTMENT OPTIONS



CLASS I

Enrollment year investment options that correspond with the beneficiary's expected college enrollment date.

BIRTH RANGE	FUND NAME	FUND NUMBER
9/1/1999 TO 8/31/2000	ENROLLMENT YEAR 2018 FUND	8002
9/1/2000 TO 8/31/2001	ENROLLMENT YEAR 2019 FUND	8003
9/1/2001 TO 8/31/2002	ENROLLMENT YEAR 2020 FUND	8004
9/1/2002 TO 8/31/2003	ENROLLMENT YEAR 2021 FUND	8005
9/1/2003 TO 8/31/2004	ENROLLMENT YEAR 2022 FUND	8006
9/1/2004 TO 8/31/2005	ENROLLMENT YEAR 2023 FUND	8007
9/1/2005 TO 8/31/2006	ENROLLMENT YEAR 2024 FUND	8008
9/1/2006 TO 8/31/2007	ENROLLMENT YEAR 2025 FUND	8009
9/1/2007 TO 8/31/2008	ENROLLMENT YEAR 2026 FUND	8010
9/1/2008 TO 8/31/2009	ENROLLMENT YEAR 2027 FUND	8011
9/1/2009 TO 8/31/2010	ENROLLMENT YEAR 2028 FUND	8012
9/1/2010 TO 8/31/2011	ENROLLMENT YEAR 2029 FUND	8013
9/1/2011 TO 8/31/2012	ENROLLMENT YEAR 2030 FUND	8014
9/1/2012 TO 8/31/2013	ENROLLMENT YEAR 2031 FUND	8015
9/1/2013 TO 8/31/2014	ENROLLMENT YEAR 2032 FUND	8016
9/1/2014 TO 8/31/2015	ENROLLMENT YEAR 2033 FUND	8017
9/1/2015 TO 8/31/2016	ENROLLMENT YEAR 2034 FUND	8018
9/1/2016 TO 8/31/2017	ENROLLMENT YEAR 2035 FUND	8019
9/1/2017 TO 8/31/2018	ENROLLMENT YEAR 2036 FUND	8020
9/1/2018 TO 8/31/2019	ENROLLMENT YEAR 2037 FUND	8021
9/1/2019 TO 8/31/2020	ENROLLMENT YEAR 2038 FUND	8022
9/1/2020 TO 8/31/2021	ENROLLMENT YEAR 2039 FUND	8023
9/1/2021 TO 8/31/2022	ENROLLMENT YEAR 2040 FUND	8024
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US GOVT CASH RESERVE FUND	8032