

For assistance, please contact our CollegeAccess 529 Plan Investor Services at 866-529-7462, Monday through Thursday, 8:30am – 6:00pm and until 5:00pm on Friday, or visit our website at CollegeAccess529.com.

Please send the completed form and application, if necessary, to one of the following addresses:

Regular Mail
College Access 529
P.O. Box 534436
Pittsburgh, PA 15253-4436

Overnight Mail
College Access 529
Attn: 534436
AIM: 154-0520
500 Ross Street
Pittsburgh, PA 15262

1. Current Account Information

Account Owner(s)	U.S. Social Security Number
Address	Email Address
City, State, ZIP Code	Account Number(s)
Evening Telephone Number	Mobile Telephone Number

By checking the preceding box, I authorize the Program Manager to replace any conflicting information and/or add any missing information to my account records, with regard to the address, email address and telephone numbers provided in this section.

2. Change of Beneficiary (Future Student)

The Account Owner may from time to time, in a manner acceptable to the Program Manager, substitute a single Designated Beneficiary in place of the previous Designated Beneficiary, provided that the substitute Designated Beneficiary is a Member of the Family of the previous Designated Beneficiary. Such substitution shall become effective when the Program Manager has received and processed such form. A Designated Beneficiary must be specified for all accounts, other than those opened by state or local government organizations and tax-exempt organizations described under Section 501(c)(3) of the Code as part of a scholarship program. For purposes of this Agreement, the term "Member of the Family" shall have the meaning given such term under Section 529(e)(2) of the Code.

Step 1 – Existing Beneficiary

Name	U.S. Social Security Number
Date of Birth	U.S. Social Security Number

Step 2 – Transfer Amount

Important: If distribution instructions are not provided below, the assets will be distributed pro rata between all open investment options.

Transfer amount to new beneficiary: Entire Balance
 Partial Balance \$ _____ or _____ %

If you hold multiple portfolios, please check one of the following:

- Distribute pro rata based on the current portfolio percentages; OR
 Distribute as follows:

Portfolio Name	Amount or Percentage
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
Total	\$ _____ or 100%

2. Change of Beneficiary (Future Student), continued

New Beneficiary – The new Designated Beneficiary must be a U.S. Citizen or Resident Alien and have a valid Social Security number. If you do not already have an existing CollegeAccess 529 Plan account for the beneficiary you are designating below, a **CollegeAccess 529 Plan Account Application is required.**

Step 3 – New Beneficiary Details

Name (First, Middle, Last)	U.S. Social Security Number	Date of Birth
Street Address	City	State
		ZIP Code
Relationship to Existing Beneficiary		Country of Citizenship – If not a U.S. citizen, a copy of a photo ID is required.

Step 4 – Transfer Instructions

- For *partial* balance transfers, if there is an option(s) maintained on the “From” account, such as Auto-Invest, banking, etc., the option(s) will remain untouched, unless we are instructed otherwise.
- For *full* balance transfers, if there is an option(s) maintained on the “From” account, it will be stopped and not carried over to the new account. If an option(s) is to be added to the new account, please complete the appropriate section on the CollegeAccess 529 Plan Account Application.

New Account – A completed CollegeAccess 529 Plan Account Application is included.

Existing account for new beneficiary, account number: _____

If the new beneficiary has an existing account, please provide allocation instructions below. If allocation instructions are not provided below, the assets will be applied to the new beneficiary’s existing account pro rata between all open investment options. Please check one of the following:

- Use the allocations currently on my account. If none, we will allocate in the same manner as your most recent contribution.
- Allocate my contributions equally between all open investment options.
- Allocate as indicated below:
- Allocate as indicated below and replace current allocation instructions for future contributions.

Portfolio Name	Contribution Amount or Percentage
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
Total	\$ _____ or 100%

