

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 to one of the following:

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

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

Fax
844-751-0047

Important Information

- If the bank account information maintained on your account has changed, please contact us.
- Your account number will remain the same. If you wish to change account ownership, please contact us at the telephone number listed above for additional requirements.
- If the change in name is for the account owner (not the beneficiary), this form can also be submitted electronically at CollegeAccess529.com. Once on the Applications and Forms tab on the Key Resources page, simply click on the electronic version and follow the prompts.

1. Current Account Information

Account Owner or Designated Beneficiary Name	U.S. Social Security Number	
Address	Email Address	
City, State, ZIP Code	Account Number(s) OR <input type="checkbox"/> If I am the Account Owner, update all accounts listed under the Social Security Number.	
<input type="checkbox"/> If I am the Account Owner, 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.	Mobile Telephone Number	Evening Telephone Number

2. Authorizing Signature & Substitute Form W-9

By signing below, I hereby request that the changes, indicated on this form, be made to the indicated CollegeAccess 529 Plan Account, and do agree, represent and warrant that I have read, understand and agree to the terms and conditions set forth in both the Participation Agreement, and the current Plan Disclosure Statement. If I am the Account Owner, I understand that I assume all investment risk of an investment in the Program, including the potential loss of principal. I understand that if there is not a financial professional associated with this account that I take full responsibility for all investment selections made. **I understand that in accordance with applicable state regulations, my account balance, if abandoned or unclaimed after a period of time specified by state law, may be transferred to the state if I do not contact VP Distributors, LLC.**

ACCOUNT OWNER AGREES THAT ANY CLAIM BY ACCOUNT OWNER OR THE DESIGNATED BENEFICIARY AGAINST THE COUNCIL, THE STATE OF SOUTH DAKOTA OR THE MEMBERS, OFFICERS AND EMPLOYEES OF THE COUNCIL OR THE STATE OF SOUTH DAKOTA MAY BE MADE SOLELY AGAINST THE ASSETS IN ACCOUNT OWNER'S ACCOUNT AND THAT ALL OBLIGATIONS HEREUNDER ARE LEGALLY BINDING CONTRACTUAL OBLIGATIONS OF THE TRUST ONLY. AS A CONDITION OF AND IN CONSIDERATION FOR THE ACCEPTANCE OF THIS AGREEMENT BY THE PROGRAM MANAGER ON BEHALF OF THE COUNCIL, ACCOUNT OWNER AGREES TO WAIVE AND RELEASE MY EMPLOYER, THE PROGRAM MANAGER, THE COUNCIL AND THE STATE OF SOUTH DAKOTA, AND EACH OF THE MEMBERS, OFFICERS, AFFILIATES, AGENTS AND EMPLOYEES OF THE PROGRAM MANAGER, THE COUNCIL AND THE STATE OF SOUTH DAKOTA, FROM ANY AND ALL LIABILITIES ARISING IN CONNECTION WITH RIGHTS OR OBLIGATIONS ARISING OUT OF THIS AGREEMENT OR THE ACCOUNT.

Substitute Form W-9

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number; and
2. I am not subject to backup withholding because:
 - a. I am exempt from backup withholding, or
 - b. I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends, or
 - c. the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. person (including a U.S. resident alien); and (4) The FATCA code(s) entered on this form _____ (if any) indicating that I am exempt from FATCA reporting is correct. Cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

If I am a nonresident alien, I am required to complete the appropriate Form W-8 to certify my foreign status. I understand that I am not under penalties of perjury certifying the above information.

NOTE REGARDING FORM W-9: The IRS does not require your consent to any provision on this application other than the certification required to avoid backup withholding.

Print Name – Former Name _____

Signature – Former Name _____

Date _____

Print Name – Current Name _____

Signature – Current Name _____

Date _____

3. Notarization – The signatures in Section 2 must be notarized.

On this _____ day of _____, 20_____ before me, personally appeared

_____ known to me or satisfactorily proved to be the person whose names are subscribed to within this instrument and acknowledges the he or she executed the same for the purposes therein contained.

NOTARY PUBLIC (affix Notarial Seal)

My Commission Expires: _____

The **CollegeAccess 529 Plan** is issued by the South Dakota Higher Education Savings Trust. The Program Manager and Underwriter for the CollegeAccess 529 Plan is VP Distributors, LLC, One Financial Plaza, Hartford, CT 06103, 800-243-4361.