



## COLUMBIA FUNDS FOREIGN ACCOUNT POLICY

### **Foreign Accounts:**

The Columbia Funds and Columbia Acorn Funds do not accept new account applications for clients with an address outside the 50 United States, the District of Columbia and the following territories: Puerto Rico, Guam, American Samoa, Northern Mariana Islands and the U.S. Virgin Islands (regardless of U.S. citizenship<sup>1</sup>).

### **Existing Foreign Accounts:**

Existing client accounts with registered addresses outside of the United States, the District of Columbia or the territories listed above, are limited to redemption transactions only. These existing clients are no longer permitted to:

- Purchase additional shares directly or through an automated investment plan.
- Exchange or transfer shares to new or existing accounts unless the address of the receiving account is in the United States or its territories.

Clients with a valid U.S. Taxpayer Identification Number who maintain an address outside the United States or its territories, and later change their address to one within the United States or its territories, will have account restrictions related to their former foreign address removed following the Columbia Funds, Columbia Acorn Funds, Columbia Future Scholar 529 Funds receipt of all necessary documentation evidencing a current residential address in the United States or its territories.

If you have any questions regarding the above, or the impact that this may have on your accounts, please call Columbia Management Investment Services Corp. toll-free at 800.345.6611 or for the Future Scholar 529 Plan at 888.244.5674. Our Shareholder Services Representatives are available Monday through Friday, from 8:00 AM until 7:00 PM ET, and will be happy to assist you. If you are calling from outside of the United States, please call 401.278.3744.

Columbia Threadneedle Investments (Columbia Threadneedle) is the global brand name of the Columbia and Threadneedle group of companies.

Securities products offered through Columbia Management Investment Distributors, Inc., member FINRA. Advisory services provided by Columbia Management Investment Advisers, LLC.

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<sup>1</sup> Military personnel residing at an APO/FPO address are eligible to invest.