



**FUTURE SCHOLAR**  
529 COLLEGE SAVING PLAN

# Designated Beneficiary Change Form

This form is to be completed to change your Designated Beneficiary. Each term used in this form has the same meaning as the term has in the Future Scholar 529 Plan Program Description, to which you should refer when completing this form. Please print clearly. If you have questions while completing this form, please call us toll free at **1.888.244.5674**, Monday through Friday, 8:00 am to 7:00 pm, Eastern time.

Your completed form and all applicable documentation should be sent to the following address:

**Regular Mail:**

Future Scholar 529 Plan  
P.O. Box 219812  
Kansas City, MO 64121-9812

**Overnight Mail:**

Future Scholar 529 College Savings Plan  
c/o DST Asset Manager Solutions, Inc.  
430 W 7th Street STE 219812  
Kansas City, MO 64105-1407

## 1. Current Account Information

### A. Designated Beneficiary's Account Information

Current Account Number

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

Designated Beneficiary's First name

Middle initial

Last name

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Designated Beneficiary's Social Security number

Date of birth (MM/DD/YY)

### B. Account Owner information

*If not an individual, indicate the type of entity (e.g., a trust) and insert the entity's legal name.*

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

Primary Account Owner's First name (or entity name)

Middle initial

Last name

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Social Security number or other Taxpayer Identification Number

Date of birth (MM/DD/YY)

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

Joint Account Owner's First name

Middle initial

Last name

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Mobile Phone Number

Home Phone Number



## 4. Investment Options

Portfolio choices are described in detail in the Program Description. You may choose to re-allocate the existing portfolios. Allocations in sections 1, 2 and 3 must collectively equal 100%. You are permitted to transfer existing balances between Portfolios twice per calendar year and upon a change in the Designated Beneficiary of the Account. See the Program Description for details.

- A. **I want to use the existing investment options for my new beneficiary.** If you are invested in an age-based allocation and the new beneficiary is in a different age bracket than the current beneficiary, your target allocation may change.
- B. **I want to establish a new investment allocation for this account.** You may select one or more Portfolios by indicating allocation percentages in the table below.

1.  **Age-Based Choice** - An initial Allocation Portfolio will be selected based on the date of birth of the Designated Beneficiary and a risk track, as you select. Over time, the Account will be reinvested automatically from the initial Allocation Portfolio to Allocation Portfolios with an increasing fixed income emphasis.

**Note: This option is designed for college (or other higher learning) expenses and may not be appropriate for shorter time periods applicable to attendance at elementary or secondary schools. See the Program Description for more complete details.**

Age-Based Options: <u>Choose one Risk Track</u>	Amount of Contribution to be Allocated (in %)
Aggressive Track	%
Moderate Track	%
Conservative Track	%

2.  **Static Portfolio Selection Choice** – You may select one or more Portfolios by indicating allocation percentages in the table below. Your investment allocation remains fixed or “static”.

Target Allocation Options:	Amount of Contribution to be Allocated (in %)
Columbia Aggressive Growth 529 Portfolio	%
Columbia Growth 529 Portfolio	%
Columbia Moderate Growth 529 Portfolio	%
Columbia Moderate 529 Portfolio	%
Columbia Moderately Conservative 529 Portfolio	%
Columbia Conservative 529 Portfolio	%
Columbia College 529 Portfolio	%

3.  **Customized Portfolio Selection Choice** – You may select one or more Portfolios by indicating allocation percentages in the table below.

Equity Options:	Amount of Contribution to be Allocated (in %)
American Century Mid Cap Value 529 Portfolio	%
Carillon Clarivest Capital Appreciation 529 Portfolio	%
ClearBridge Large Cap Growth 529 Portfolio	%
ClearBridge Small Cap 529 Portfolio	%
Columbia Contrarian Core 529 Portfolio	%
Columbia Dividend Income 529 Portfolio	%
Columbia Emerging Markets 529 Portfolio	%
Columbia Select Large Cap Growth 529 Portfolio	%
DFA International Core Equity 529 Portfolio	%
iShares Russell 1000 ETF 529 Portfolio	%
iShares Russell 2000 ETF 529 Portfolio	%
iShares Russell 3000 ETF 529 Portfolio	%
Janus Henderson Enterprise 529 Portfolio	%
MFS Value 529 Portfolio	%
Principal Real Estate Securities 529 Portfolio	%
<b>Fixed Income Options:</b>	
Columbia Income Opportunities 529 Portfolio	%
Columbia Total Return Bond 529 Portfolio	%
Columbia Short Term Bond 529 Portfolio	%
Columbia Quality Income 529 Portfolio	%
FA Strategic Income 529 Portfolio	%
iShares TIPS Bond ETF 529 Portfolio	%
JPMorgan Core Bond 529 Portfolio	%
PGIM Global Total Return USD Hedged 529 Portfolio	%
<b>Cash and Cash Equivalent Options:</b>	
Columbia Bank Deposit 529 Portfolio	%
Columbia Legacy Capital Preservation 529 Portfolio	%
<b>TOTAL</b>	<b>%</b>

4.  **Dollar Cost Averaging from the Columbia Legacy Capital Preservation 529 Portfolio**

Complete this section to have your contribution in the Columbia Legacy Capital Preservation 529 Portfolio allocated monthly or quarterly into other portfolios available in the Plan. To take advantage of this option, you must have at least \$1,000 to contribute and you must set up your monthly or quarterly allocations at this time. By completing this section, you authorize Future Scholar 529 Program Advisor Plan to allocate the amount you designate from the Columbia Legacy Capital Preservation 529 portfolio on a monthly or quarterly basis into your chosen investment options. Allocations continue until no balance remains in the Columbia Legacy Capital Preservation 529 Portfolio. You have the option to cease or alter your monthly or quarterly allocations only in the limited circumstances described in the Program Description.

**A. Dollar Cost Averaging Initial investment (\$1,000 Minimum)**

Columbia Legacy Capital Preservation 529 Portfolio	%
--	---

**B. Dollar Cost Averaging Frequency**

Please indicate the frequency for making allocations from the Columbia Legacy Capital Preservation 529 Portfolio to the portfolio(s) designated in 3C below. If you do not indicate a draft date, the systematic exchange will be processed on the 15th of the month or quarter.

Systematic Exchange will be processed  Monthly  Quarterly on the \_\_\_\_\_ day of the month/quarter.

**C. Dollar Cost Averaging SYSTEMATIC EXCHANGE AMOUNT**

Please allocate the dollar amount indicated into the investment options selected below. Allocations continue until no balance remains in the Columbia Legacy Capital Preservation 529 Portfolio.

**SYSTEMATIC EXCHANGE Portfolio Selection: Note minimum systematic exchange amount is \$25.00 per portfolio.**

**Age-Based Portfolio Selection Choice** (portfolio will be based on the beneficiary's date of birth and the risk track selected below).

Age-Based Options: <i>If investing in age-based Choose one Risk Track</i>	Systematic Exchange Amount
Aggressive Track	\$
Moderate Track	\$
Conservative Track	\$

**Static Portfolio Selection Choice** – You may select one or more Portfolios by indicating the dollar amount(s) in the table below. Your investment allocation remains fixed or “static”.

Target Allocation Options:	Systematic Exchange Amount
Columbia Aggressive Growth 529 Portfolio	\$
Columbia Growth 529 Portfolio	\$
Columbia Moderate Growth 529 Portfolio	\$
Columbia Moderate 529 Portfolio	\$
Columbia Moderately Conservative 529 Portfolio	\$
Columbia Conservative 529 Portfolio	\$
Columbia College 529 Portfolio	\$

**Customized Portfolio Selection Choice** – You may select one or more Portfolios by indicating the dollar amount(s) in the table below.

Equity Options:	Systematic Exchange Amount
American Century Mid Cap Value 529 Portfolio	\$
Carillon Clarivest Capital Appreciation 529 Portfolio	\$
ClearBridge Large Cap Growth 529 Portfolio	\$
ClearBridge Small Cap 529 Portfolio	\$
Columbia Contrarian Core 529 Portfolio	\$
Columbia Dividend Income 529 Portfolio	\$
Columbia Emerging Markets 529 Portfolio	\$
Columbia Select Large Cap Growth 529 Portfolio	\$
DFA International Core Equity 529 Portfolio	\$
iShares Russell 1000 ETF 529 Portfolio	\$
iShares Russell 2000 ETF 529 Portfolio	\$
iShares Russell 3000 ETF 529 Portfolio	\$
Janus Henderson Enterprise 529 Portfolio	\$
MFS Value 529 Portfolio	\$
Principal Real Estate Securities 529 Portfolio	\$
Fixed Income Options:	Systematic Exchange Amount
Columbia Income Opportunities 529 Portfolio	\$
Columbia Total Return Bond 529 Portfolio	\$
Columbia Short Term Bond 529 Portfolio	\$
Columbia Quality Income 529 Portfolio	\$
FA Strategic Income 529 Portfolio	\$
iShares TIPS Bond ETF 529 Portfolio	\$
JPMorgan Core Bond 529 Portfolio	\$
PGIM Global Total Return USD Hedged 529 Portfolio	\$
<b>TOTAL</b>	

## 5. Successor Account Owner (Optional)

In the event of the death of the Account Owner, a successor Account Owner would become the new Account Owner. Successor Account Owners shall not be designated in the case of joint account ownership. In the event of the death or incapacity of a joint Account Owner, the remaining Account Owner shall become the sole Account Owner and may at that time designate a Successor Account Owner. You may call 1.888.244.5674 or visit [www.columbiathreadneedleus.com](http://www.columbiathreadneedleus.com) for an Account Services form to designate a successor Account Owner, or to change or revoke a Successor Account Owner designation.

A. I want my successor Account Owner on file for the account listed in Section 1 to carry over to the new beneficiary's account.

Or

B. Complete the information below to designate a successor Account Owner.

Name of successor Account Owner, Custodian, or trustee (first) (m.i.) (last)

Social Security number of successor Account Owner or Taxpayer Identification Number of trust or agency

Date of Birth of successor Account Owner or Date of trust (month/day/year)

If the successor Account Owner will be a trust name of trust

## 6. Telephone and Online Privileges

Unless otherwise indicated below, I authorize Future Scholar 529 College to accept telephone and online instructions from any person identifying themselves as owner of the account or owner's broker to (a) exchange share(s) of my account for shares of the same class or equivalent class of any other Future Scholar Portfolios and (b) to redeem shares, without signature guarantee, held in my account, and (c) to transfer shares via electronic bank transfer between the 529 account and bank account provided in section 7. Telephone and online exchanges, purchases, and redemptions are subject to procedures and conditions set forth in the program description. I understand that up to \$100,000 may be redeemed by telephone and online redemption daily. Future Scholar 529 Plan will employ reasonable procedures specified by Future Scholar to confirm that such telephone instructions are genuine. Neither Future Scholar, nor their designated agents, will be liable for any loss due to unauthorized or fraudulent instructions if such procedures are followed. Telephone privileges may be modified or terminated without notice. Furthermore, I agree to indemnify and hold harmless Columbia Management Investment Advisers, LLC, or any of their affiliates, that may be involved in transactions authorized by telephone, against any claim, loss, expense or damage, including reasonable fees of investigation and counsel in connection with any telephone instructions effected for my account.

I do **NOT** want the Exchange Privilege

I do **NOT** want the Redemption Privilege

I do **NOT** want the Electronic Bank Transfer Purchase privilege

I do **NOT** want the Electronic Bank Transfer Redemption privilege

## 7. Bank Information:

To add bank instructions to your Future Scholar 529 Account for electronic bank transfers or for use with the Automatic Contribution Plan, please complete the section. You may log into your account online to add, change, or delete bank information at a later date. Additionally, you can call 1.888.244.5674 or visit [www.columbiathreadneedleus.com](http://www.columbiathreadneedleus.com) for an Automatic Contributions/Electronic Bank Transfer Form. Your bank must be a member of the Automated Clearing House System to use these services.

A. I want my bank instructions on file for the account listed in Section 1 to carry over to the new beneficiary's account.

Or

B. Please complete the information below:

**Account type:**  Checking  Savings

Bank Name

Bank account number (Do not use spaces or dashes)

Bank routing number (your bank can provide this)

Name of bank account owner

Name of joint owner, if applicable

### Bank account owner(s) authorization

Signature of bank account owner

Signature of bank account co-owner

## 8. Automatic Contribution Plan

I choose to have contributions to my new Future Scholar 529 Plan account automatically withdrawn from my bank account. I would like my automatic contribution plan established in the portfolio(s) listed below:

\$

- A. ACP Instructions:** Use the investment allocations instructions in Section 4 for my ACP.
- B. Override Investment Allocation Instructions:** By selecting this option, your ACP will be based on the allocation instructions you provide in the portfolios below and must collectively equal 100%. This will NOT affect your investment allocations instructions in Section 4.

Portfolio Number Or Portfolio Name	%
Portfolio Number Or Portfolio Name	%
<b>Total</b>	%

### Frequency:

Transaction should occur:  All Months or  Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sept  Oct  Nov  Dec

I would like my ACP to occur on the following date(s): \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

\* If no date is indicated, withdrawals will be made on the 15th of each month. If the withdrawal date (or the 15th of the month, where applicable) falls on a weekend or holiday, withdrawals will be made on the next business day. It can take up to 10 business days after acceptance by the Program Manager for the debits to begin on the day and with the frequency specified.

## 9. Signature(s)

By signing below, I certify that I am the Account Owner of the Account indicated on this form, that the information provided on this form is in all respects true, complete and correct, that the change and/or the designation reflected on this form is to be reflected in accordance with the current Program Description, and that I fully understand the consequences of such change(s) and/or designation.

\_\_\_\_\_  
Print Name of Account Owner (Include capacity, if applicable)

\_\_\_\_\_  
Signature of Account Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name of Joint Tenant (if applicable)

\_\_\_\_\_  
Signature of Joint Tenant

\_\_\_\_\_  
Date

Columbia Management Investment Distributors, Inc., member FINRA, is the distributor and underwriter for 529 plans available through Columbia Management. The Office of State Treasurer of South Carolina (the State Treasurer) administers the Program and has selected Columbia Management Investment Advisers, LLC and Columbia Management Investment Distributors, Inc. (Columbia Management) as Program Manager. Columbia Management and its affiliates are responsible for providing certain administrative, recordkeeping and investment services, and for the marketing of the Program. Columbia Management is not affiliated with the State Treasurer.

