

**FUTURE SCHOLAR**  
529 COLLEGE SAVING PLAN

Use this form to: (check all that apply)

- Change your address\*
- Change your legal name due to marriage, divorce or for some other reason
- Add or update your email address for E-Delivery\*
- Add or update your Successor Account Owner
- Add or update Interested Party or Additional Mail information

\*You can also log in online at [www.columbiathreadneedle.com/us](http://www.columbiathreadneedle.com/us) to complete this option.

If you have questions completing this form, please call us toll free at 1.888.244.5674.

**Regular Mail:**

Future Scholar 529 Plan  
P.O. Box 8036  
Boston, MA, 02266-8036

**Overnight Mail:**

Future Scholar 529 Plan  
30 Dan Road, Suite 8036  
Canton, MA, 02021

**I. Current Account Information**

**A. Designated Beneficiary's Account Information**

Current Account Number

Designated Beneficiary's First name

Middle initial

Last name

Designated Beneficiary's Social Security number or other taxpayer identification 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.*

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

Middle initial

Last name

Social Security number or other taxpayer identification number

Date of birth (MM/DD/YY)

Joint Account Owner's First name

Middle initial

Last name

Contact telephone number

## II. Updated Account Owner Information

- Complete this section to update an Account Owner's or the Designated Beneficiary's name due to marriage, divorce or for another reason.
- If changing a name, a signature guarantee or signature validation program stamp must also be provided in this section.

### New Name to be shown on account:

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First Name (or entity name)

Middle initial

Last name

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Contact telephone number

### Former Name (as currently shown on account)

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First Name (or entity name)

Middle initial

Last name

### I hereby certify that:

(Please print former name)

and

(Please print new name)

are One and the Same Person.

\_\_\_\_\_  
\*Signature (former name)

\_\_\_\_\_  
Date

\_\_\_\_\_  
\*Signature (new name)

\_\_\_\_\_  
Date

### Medallion Signature Guarantee Stamp

The Transfer Agent may require a Medallion Signature Guarantee for your signature in order to process certain transactions. A Medallion Signature Guarantee helps assure that a signature is genuine and not a forgery. A Medallion Signature Guarantee must be provided by an eligible guarantor institution including, but not limited to, the following: bank, credit union, savings association, broker or dealer, that participates in the Securities Transfer Association Medallion Program (STAMP), the Stock Exchange Medallion Program (SEMP) or the New York Stock Exchange Medallion Signature Program (MSP). Notarization by a notary public is not an acceptable signature guarantee. The Transfer Agent reserves the right to reject a signature guarantee and to request additional documentation for any transaction.

### Medallion Signature Guarantee Stamp

## III. Updated Address Information

- Complete this section to update your address on file.
- This address change applies to the following persons listed on the account (check all that apply):

Primary Account Owner

Joint Account Owner

Designated Beneficiary

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Street Address

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City

State

Zip Code

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Account Mailing Address if different from above (This address will be used as the Account's address of record and for all Account mailings.)

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City

State

Zip Code

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Contact telephone number

## IV. Electronic Delivery of Documents (E-delivery)

**Yes!** I want to save paper and have my statements, Program Descriptions and other materials provided to me electronically rather than in the mail. I am aware that I will need to log into my account online to confirm and to see statements.

E-mail address for Electronic Delivery of Documents

I understand that, by checking the box above, I hereby consent to receive statements, program descriptions and supplements electronically for my Future Scholar accounts. This means that I will not receive the specified documents in paper format through the U.S. mail. I understand that, when my documents become available, I will receive an e-mail notification at the e-mail address I have entered, which will contain a hyperlink to the specified documents on the Columbia Management website at [columbiathreadneedle.com/us](http://columbiathreadneedle.com/us). If the material I have selected for eDelivery is returned due to an e-mail address failure, I understand that the material will be sent to me via U.S. mail. I understand that my consent is effective immediately and will remain in effect unless and until I revoke my consent, which I may do at any time by contacting Future Scholar at 888.244.5674. Whether or not I revoke my consent, I may request, at any time, to receive a paper copy of any document by contacting a customer service representative at 888.244.5674 or I may view and print documents from [Columbiathreadneedle.com/us](http://Columbiathreadneedle.com/us). Although eDelivery is offered as a complimentary service, I understand that I may incur fees or charges from my internet service provider or Telephone Company for accessing the internet. I also understand that a more detailed explanation of the eDelivery program is contained in the eDelivery FAQs.

As indicated above, the documents specified for eDelivery can also be viewed on [columbiathreadneedle.com/us](http://columbiathreadneedle.com/us). Once on our site, you can print or download your documents using Adobe Acrobat, which is available free of charge. Your email address will not be used for marketing email messages for other services.

## V. Successor Account Owner

Fill in this section for a new Successor Account Owner or for a change of Successor Account Owner.

- Add successor Account Owner
- Replace successor Account Owner
- Update current successor Account Owner information
- Remove the successor Account Owner

First name (or entity name)

Middle initial

Last name

Social Security number or other taxpayer identification number

Date of birth (MM/DD/YY)

## VI. Interested Party and Additional Mail Information

Fill in this section if you want additional persons as an interested party to receive quarterly statements as well as confirmation statement copies on the Account or if you are replacing or changing interested party information on your account. **The interested party and additional mail party(s) listed on your account are able to call and receive account-specific information, but they are not authorized to transact on the account.**

- Add interested party
- Replace interested party
- Update current interested party information
- Remove the interested party information

First name (or entity name)

Middle initial

Last name

Street Address

City

State

Zip Code

## VII. Signatures

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 information change(s) and/or action authorized on this form is to be reflected or taken, as applicable, in accordance with the current Future Scholar 529 Plan Program Description, and that I fully understand the consequences of such change(s) and/or action.

Please note, this form may not be submitted to change the account registration in any way other than altering one name (generally resulting from marriage, divorce, etc.).

**X** \_\_\_\_\_  
Account Owner's signature (Include capacity, if applicable)

**X** \_\_\_\_\_  
Joint Account owner's signature (required for joint registration)

"Columbia Management Investment Distributors, Inc., member FINRA, is the distributor and underwriter for the Columbia Management Future Scholar 529 Plan Financial Advisor Program. 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. Columbia Management Investment Services Corp. is the transfer agent for Columbia Funds."

