



**FutureScholar**   
529 College Savings Plan

## Financial Intermediary Change Form

Please complete this form to change the financial advisor or financial intermediary listed on your Future Scholar 529 Plan account. If you have questions, please contact a Future Scholar customer service representative at **1.888.244.5674**, Monday through Friday, 8:00 am to 7:00 pm, Eastern time.

**Please return your  
completed form to:**

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

### 1. Account Registration

\_\_\_\_\_  
Name of Primary Account Owner (first)

\_\_\_\_\_  
(m.i.)

\_\_\_\_\_  
(last)

\_\_\_\_\_  
Name of Joint Account Owner (first)

\_\_\_\_\_  
(m.i.)

\_\_\_\_\_  
(last)

### 2. Account Information

\_\_\_\_\_  
Portfolio – account number

\_\_\_\_\_  
Portfolio – account number

\_\_\_\_\_  
Portfolio – account number

\_\_\_\_\_  
Portfolio – account number

\_\_\_\_\_  
Portfolio – account number

\_\_\_\_\_  
Portfolio – account number

\_\_\_\_\_  
Portfolio – account number

\_\_\_\_\_  
Portfolio – account number

### 3. Current Financial Intermediary Information

\_\_\_\_\_  
Current Firm

\_\_\_\_\_  
Current Registered Representative's Name

### 4. New Financial Intermediary Information

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Branch ID

\_\_\_\_\_  
Registered Representative's Name

\_\_\_\_\_  
Registered Representative's ID Number

\_\_\_\_\_  
Registered Representative's Telephone Number

\_\_\_\_\_  
Network Level

\_\_\_\_\_  
Account # with new financial intermediary (optional)

### 5. Signature

\_\_\_\_\_  
Account Owner's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Account Owner's signature (required for joint registration)

\_\_\_\_\_  
Date

The Advisor Plan is sold exclusively through financial advisors. Certain investors may also be eligible to participate in the Direct Plan, which is sold directly by the Program. The Direct Plan offers a more limited selection of investment choices than the Advisor Plan, and the fees and expenses are lower. Please refer to the Program Description for more information.

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