

FUTUREScholar

529 College Savings Plan™

Investment Change Request

Use this form to make changes to current or future investment allocations.

If you have questions while completing this form, please call us toll free at 1.888.244.5674, Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Time.

Please print or type, and keep a copy of this form for your records. Send your completed form and all applicable documentation to the following address:

Regular mail:

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

Overnight mail:

Future Scholar 529 College Savings Plan
30 Dan Road
Canton, MA 02021

I. Current Account information

A. Future Scholar 529 College Savings Plan Account number

B. Account Owner information

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

Mr. Mrs. Ms. Other

_____ Social Security number or other taxpayer identification number

_____ First name (or entity name) Middle initial Last name

_____ Street address

_____ City/State ZIP code

() ()
_____ Daytime telephone number Evening telephone number Date of birth (MM/DD/YY)

C. Designated Beneficiary information

Mr. Mrs. Ms. Other

_____ Social Security number or other taxpayer identification number Date of birth (MM/DD/YY)

_____ First name Middle initial Last name

_____ Street address City/State ZIP code

Number of years until first expected withdrawal: _____ years

Investments in Future Scholar 529 College Savings Plan:

• Are Not FDIC Insured • May Lose Value • Are Not Bank or State Guaranteed

Columbia Management Distributors, LLC, the distributor and program manager, is a registered broker-dealer, member NASD, SIPC and a nonbank affiliate of Bank of America, N.A. Columbia Management Distributors, LLC does not provide tax advice. Please consult your tax advisor before making tax-related decisions. Services are also provided by Bank of America, N.A.

II. Portfolio Choices

Portfolio Choices are described in detail in the Program Description. You may choose to allocate your initial and future contribution among the Portfolios. All future contributions will be invested in these Portfolios according to the choices you select unless you change your allocations. You are permitted to transfer existing balances between Portfolios one time per calendar year and upon a change in the Designated Beneficiary of the Account. See the Program Description statement for details.

Please check all that apply: Reallocate existing portfolios Reallocate future portfolios

Sales charge option* (see Program Description): A B** C

1. **Automatic Allocation Choice** – An initial Allocation Portfolio will be selected based on the date of birth of the Designated Beneficiary (provided in Section I) or the number of years until first expected withdrawals, 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. Portfolios are listed in the table below; see the Program Description for more complete details.

Allocation based on: Age of Designated Beneficiary Number of years until first expected withdrawal

Designated Beneficiary #1	Designated Beneficiary #2
Pricing Alternative*: <input type="checkbox"/> A <input type="checkbox"/> B** <input type="checkbox"/> C	Pricing Alternative*: <input type="checkbox"/> A <input type="checkbox"/> B** <input type="checkbox"/> C
Automatic Allocation Choice to be based on: <input type="checkbox"/> Age of Designated Beneficiary (provided in Section II) or <input type="checkbox"/> Years to Withdrawal: _____	Automatic Allocation Choice to be based on: <input type="checkbox"/> Age of Designated Beneficiary (provided in Section II) or <input type="checkbox"/> Years to Withdrawal: _____

Age of Designated Beneficiary	Number of Years Until First Expected Withdrawal	Portfolio Name
0-5 years	13 or more	Aggressive Growth Portfolio
6-8 years	10 – 12	Growth Portfolio
9-11 years	7 – 9	Balanced Growth Portfolio
12 – 15 years	3 – 6	Balanced Portfolio
16 – 17 years	1 – 2	Income & Growth Portfolio
18 years or older	Attendance has begun	Income Portfolio

2. **Portfolio Selection Choice** – You may select one or more Portfolios by indicating allocation percentages in the table below. Your allocations must collectively equal 100%. If your Portfolio allocations total less than 100%, unallocated amounts will be automatically allocated to the Stable Capital Portfolio. If your Portfolio allocations total more than 100%, the contribution will be returned to you.

Portfolio Name	Designated Beneficiary #1	Designated Beneficiary #2
	Pricing Alternative*: <input type="checkbox"/> A <input type="checkbox"/> B** <input type="checkbox"/> C	Pricing Alternative*: <input type="checkbox"/> A <input type="checkbox"/> B** <input type="checkbox"/> C
	Percentage of Contribution to be Allocated	Percentage of Contribution to be Allocated
Allocation Portfolios		
• Aggressive Growth Portfolio	%	%
• Growth Portfolio	%	%
• Balanced Growth Portfolio	%	%
• Balanced Portfolio	%	%
• Income & Growth Portfolio	%	%
• Income Portfolio	%	%
Single-Fund Portfolios		
• Convertible Securities Portfolio	%	%
• LargeCap Value Portfolio	%	%
• MidCap Value Portfolio	%	%
• Growth Equities Portfolio	%	%
• LargeCap Core Portfolio	%	%
• Focused Equities Portfolio	%	%
• MidCap Growth Portfolio	%	%
• SmallCap Value Portfolio	%	%
• SmallCap Growth Portfolio	%	%
• Multi-Advisor International Equity Portfolio	%	%
• International Opportunities Portfolio	%	%
• Federal Securities Portfolio	%	%
• Total Return Bond Portfolio	%	%
• High Income Portfolio	%	%
• 21st. Century Portfolio	%	%
• Ac. Portfolio	%	%
• Ac. Select Portfolio	%	%
• Ac. USA Portfolio	%	%
• Stable Capital Portfolio	%	%

* For information on Pricing Alternatives, please refer to the Program Description. If no Pricing Alternative is designated, Pricing Alternative A will be selected. This includes an initial Sales Charge.

** Pricing Alternative B is generally not suitable unless withdrawals are expected more than 6 years from the date of investment. Account Owners should consult with their broker-dealers to determine whether Pricing Alternative B is appropriate for their particular circumstances.

