

New York's 529 College Savings Plan

Advisor Plan

Please return your completed form to:

PO Box 55447
Boston, MA 02205-5447

Broker/Dealer Change Request Form

Please write in all capital letters, using blue or black ballpoint pen, and be sure to fill out the form completely. Incomplete forms cannot be processed.

Please complete this form to authorize the change of financial advisor firm listed on your New York's 529 College Savings Program *Advisor Plan* account. If you have questions, please contact a New York's 529 College Savings Program *Advisor Plan* representative at 1-800-774-2108.

1. Account information

Name of Account Owner or trustee (first) _____ (m.i.) _____ (last) _____

Social Security number of Account Owner or taxpayer ID of trust _____

Portfolio – account number _____ Portfolio – account number _____

Portfolio – account number _____ Portfolio – account number _____

2. New dealer information

Name of financial advisor's firm _____ Branch office number _____

Branch office street address _____

Branch office city _____

State _____ Zip _____ Branch office phone number _____

New financial advisor's name (first) _____ (m.i.) _____ (last) _____

New financial advisor's ID _____ New financial advisor's phone number _____

Account number at new financial advisor's firm _____

Main office city _____ State _____

3. Sign here

Please note that forms submitted without both signatures will not be processed.

Account Owner's signature _____ Date _____

Authorized signature of financial advisor's firm _____ Date _____

New York's 529 College Savings Program *Advisor Plan* is described in the current applicable Program Brochure and Tuition Savings Agreement. Accounts are opened by completing an Enrollment Application. All of these should be read carefully before opening an account. None of the State of New York, its agencies, the Federal Deposit Insurance Corporation (FDIC), Columbia Management Group, LLC or its affiliates, or Upromise Investments, Inc. insures accounts or guarantees the principal deposited therein or any investment returns on any account or investment portfolio. The value of your account will vary based on market conditions and the performance of the investment options you select, and may be more or less than the amount you deposit. Tax benefits are subject to certain limitations and certain withdrawals are subject to federal, state and local taxes. If you are a resident or taxpayer of another state, you should consider whether that state offers a 529 Plan with tax or other benefits that are not available through this Program. You should consult your tax advisor. Investments may be made through financial advisors that have entered into selling agreements. Columbia Management Distributors, Inc., distributor.

New York's 529 College Savings Program currently includes two separate 529 plans. The Advisor Plan is sold exclusively through financial advisors. You may also participate in the Direct Plan, which is sold directly by the Program and offers lower fees. However the investment options available under the Advisor Plan are not available under the Direct Plan. The fees and expenses of the Advisor Plan include compensation to the financial advisor. Be sure to understand the options available before making an investment decision.

Columbia Management Distributors, Inc.
One Financial Center, Boston, MA 02111-2621
529NY-33/107563-0306
32-55-0077NSB 02-2006