

New York's 529 College Savings Program

Advisor Plan

Please return your completed form to:

PO Box 55447
Boston, MA 02205-5447

Reallocation/Allocation 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.

1. Use this form to change your investment option allocations as part of your once-per-year reallocation.
2. Use this form to allocate your investment option allocations as part of a change of Designated Beneficiary.
3. If additional forms are required, they must be submitted with this request.
4. Sign and date the form. Mail it and all other required forms together to the address shown above.
5. Use one form for each type of transaction.
6. If you need to obtain additional forms, visit www.ny529advisor.com or call 1-800-774-2108.

1. Type of investment change (check one)

Once-per-year reallocation of an existing account

New allocation(s) as part of a Designated Beneficiary change
(A Change of Designated Beneficiary Form must accompany this request.)

Note: Assets reallocated/allocated from one portfolio to another will be used to purchase the same class of units in the newly selected portfolio as the units being surrendered. The same holding period of the previously held units will be carried over to the new units for purposes of calculating any applicable contingent deferred sales charge. After you reallocate/allocate units of one portfolio to units of another portfolio, you will be subject to all the fees associated with the new portfolio.

2. Current account information

Account Owner information

Name of Account Owner (first)

(m.i.)

(last)

Social Security number or taxpayer ID of Account Owner

Current Designated Beneficiary information

Name of Designated Beneficiary (first)

(m.i.)

(last)

Social Security number of Designated Beneficiary or taxpayer ID

3. If part of a change of Designated Beneficiary, complete this section

In order to fulfill your request, all the information in this section must be completed.

Has an existing account
(A Change of Designated Beneficiary Form must accompany this form.)

Does not have an existing account
(An Enrollment Application and a Change of Designated Beneficiary Form must accompany this form.)

New Designated Beneficiary

Name of new Designated Beneficiary (first)

(m.i.)

(last)

Social Security number or taxpayer ID of new Designated Beneficiary

4. Investment reallocation/allocation choices (cont.)

FROM:

Portfolio - account number

Transfer the specified amount or the entire balance
 \$, . OR %

TO:

If you use %, use whole numbers and make sure the total equals 100%.

If you use \$, make sure the "TO" amount adds up to the "FROM" amount.

Asset allocation portfolios:

_____ Aggressive Growth NY 529 Portfolio
 _____ Growth NY 529 Portfolio
 _____ Moderate Growth NY 529 Portfolio
 _____ Balanced NY 529 Portfolio
 _____ Conservative NY 529 Portfolio
 _____ College NY 529 Portfolio
 _____ Columbia Diversified Income NY 529 Portfolio
 _____ Columbia Current Income NY 529 Portfolio

_____ Columbia Mid Cap Value NY 529 Portfolio
 _____ Columbia Acorn Select NY 529 Portfolio
 _____ Columbia Small Cap Core NY 529 Portfolio
 _____ Columbia Acorn USA NY 529 Portfolio
 _____ Columbia Acorn NY 529
 _____ Columbia Small Cap Value NY 529
 _____ Columbia Intermediate Bond NY 529
 _____ Columbia Strategic Income NY 529
 _____ Premiere Aggressive Growth NY 529 Portfolio
 _____ Premiere Large Cap Value NY 529 Portfolio
 _____ Premiere Classic Value NY 529 Portfolio
 _____ Premiere Global Allocation NY 529 Portfolio
 _____ Premiere International Equity NY 529 Portfolio

Customized portfolios:

_____ Columbia Thermostat NY 529 Portfolio
 _____ Columbia Large Cap Value NY 529 Portfolio
 _____ Columbia Marsico Growth NY 529 Portfolio

FROM:

Portfolio - account number

Transfer the specified amount or the entire balance
 \$, . OR %

TO:

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 _____ Columbia Current Income NY 529 Portfolio

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 _____ Columbia Acorn Select NY 529 Portfolio
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 _____ Premiere International Equity NY 529 Portfolio

Customized portfolios:

_____ Columbia Thermostat NY 529 Portfolio
 _____ Columbia Large Cap Value NY 529 Portfolio
 _____ Columbia Marsico Growth NY 529 Portfolio

4. Investment reallocation/allocation choices (cont.)

C. Dollar cost averaging (DCA) from the Columbia Current Income NY 529 Portfolio

By completing this section, you authorize **New York's 529 College Savings Program Advisor Plan** to allocate the amount you designate from the Columbia Current Income NY 529 Portfolio on a monthly basis into your chosen investment options. Allocations continue until no balance remains in your Columbia Current Income NY 529 Portfolio account.

Start a new DCA program

Change an existing DCA program

When changing an existing DCA program, all previous automatic monthly allocations will be stopped. The DCA program will run according to the automatic monthly allocation instructions provided below.

Note: You have the option to cease or alter your monthly allocations only in the limited circumstances described in the Program Brochure. Changes to the monthly automatic allocation amounts in a DCA program will be considered your once-per-year reallocation on the account, even if it is part of a change of Designated Beneficiary.

Reallocate/allocate from the following portfolios into the Columbia Current Income NY 529 Portfolio:

Note: There must be at least a total of \$5,000 in the Columbia Current Income NY 529 Portfolio to participate in the DCA Program.

Portfolio - account number

Transfer the specified amount or the entire balance
 \$, . OR %

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Transfer the specified amount or the entire balance
 \$, . OR %

Portfolio - account number

Transfer the specified amount or the entire balance
 \$, . OR %

Please allocate the following amount(s) from the Columbia Current Income NY 529 Portfolio to the portfolio(s) indicated below each month (\$100 minimum per portfolio):

Allocate to:

Asset allocation portfolios:

\$ _____ Aggressive Growth NY 529 Portfolio
 \$ _____ Growth NY 529 Portfolio
 \$ _____ Moderate Growth NY 529 Portfolio
 \$ _____ Balanced NY 529 Portfolio
 \$ _____ Conservative NY 529 Portfolio
 \$ _____ College NY 529 Portfolio
 \$ _____ Columbia Diversified Income NY 529 Portfolio
 \$ _____ Columbia Current Income NY 529 Portfolio

\$ _____ Columbia Mid Cap Value NY 529 Portfolio
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Customized portfolios:

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5. Signature

My signature below certifies that the information contained in this form and in any attachment to this form is true and correct. I authorize the allocation, as part of a change of Designated Beneficiary, or reallocation from my account(s) based on the information I have reported within this form. I understand and agree to all the terms of this reallocation/allocation as presented on this form and in the Program Brochure and Tuition Savings Agreement. I also acknowledge that it is the responsibility of the Account Owner and Designated Beneficiary to maintain adequate records and receipts to substantiate all transactions that occur in the account(s). I hereby agree that 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. will be liable for any loss, cost or expenses for acting upon such instructions.

Signature of Account Owner

Date

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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.

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 who have entered into selling agreements with Columbia Management Distributors, Inc., distributor.