

FUTUREScholar

529 College Savings Plan™

Change of successor account owner

Use this form if you want to add, change, or revoke the designation of the individual you wish to own your Future Scholar 529 College Savings Plan account upon your death or disability. **Do not use this form to change the Designated Beneficiary of your Account.**

An Account Owner may designate a Successor Account Owner to become the owner of his/her Account automatically upon the Account Owner's death or disability upon submission of a certified death certificate or other appropriate documentation. With a Successor Account Owner, assets of the Account are not deemed assets of the Account Owner's estate. You must complete a separate Successor Account Owner form for each of your Future Scholar 529 College Savings Plan accounts. If you are revoking the current Successor Account Owner of your account without designating a new Successor Account Owner, just check the revoke box below and do not complete Section II. If you check the change box, your current Successor Account Owner will be revoked and you must complete Section II to establish a new Successor Account Owner.

For questions, call toll-free at 888.244.5674, Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern time.

Please print clearly or type, and keep a copy for your records.

Send your completed form to Future Scholar 529 College Savings Plan along with the appropriate check made payable to Future Scholar 529 College Savings Plan.

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

Check one:

Designate a Successor Account Owner for the first time Revoke existing Successor Account Owner Change Successor Account Owner

Note: If you want to change the Account Owner, you must fill out a new Account application.

I. Current Account information

A. Account number

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)

Current account information continued on page 2

Investments in Future Scholar 529 College Savings Plan:

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

Columbia Management Distributors, Inc., the distributor and program manager of the plan, is a registered broker-dealer, member of the NASD, SIPC and is a non-bank affiliate of Bank of America, N.A.. **Columbia Management Distributors, Inc.** and its affiliates do not provide tax advice. Please consult your tax advisor for tax guidance.

I. Current Account information *(continued)*

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

II. New or change of Successor Account Owner information

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

New Successor Account Owner Change of Successor Account Owner

Mr. Mrs. Ms. Other

Social Security number or other taxpayer identification number

First name

Middle initial

Last name

Street address

City/State

ZIP code

()

Daytime telephone number

()

Evening telephone number

Email address*

Date of birth (MM/DD/YY)

*Email consent _____

III. Signature

By signing below, I designate a Successor Account Owner, revoke an existing Successor Account Owner designation, or revoke the existing Successor Account Owner and designate a new Successor Account Owner for my Future Scholar 529 College Savings Plan account. I have read the Program Description and understand that this designation is not revoked by will or codicil. I will notify my Successor Account Owner of his or her status and will indicate that a certified copy of a death certificate or other appropriate documentation identifying the Account Owner by name or such other proof of death or disability that is recognized under applicable laws at the time of death or disability must be presented. The Successor Account Owner must be a U.S. citizen or resident alien.

Signature of Account Owner

Date

(If the Account Owner is a legal entity, the title of the individual signing for the entity should be indicated.)

Signature of parent, guardian or custodian if Account is funded by UGMA/UTMA assets and Designated Beneficiary is a minor

Date

Fill out this form to designate a Successor Account Owner to become the owner of your account automatically upon your death or disability. A change in circumstances, like divorce, may revoke your designation. Please consult your own legal adviser. The Successor Account Owner can be a minor, and must complete a new Account Application upon your death or disability. See the Program Description for further details. The Successor Account Owner that you designate on this form will be the owner of all investments in your Future Scholar 529 College Savings Plan account upon your death or disability. It is not possible to designate a different Successor Account Owner for the different investments held by your Account. **To change the Designated Beneficiary of your Account, you must complete a Change of Beneficiary form.**

