

# Columbia 529 Plan

Please return  
your completed  
form to:

Columbia 529 Plan  
PO Box 8472  
Boston, MA 02266-8472

## 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 Columbia 529 Plan account. If you have questions, please contact a Columbia 529 Plan representative at 877.994.2529.

### 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

### 2. New dealer information

\_\_\_\_\_  
Name of financial advisor's firm Branch office number

\_\_\_\_\_  
Branch office street address

\_\_\_\_\_  
Branch office city

\_\_\_\_\_  
State Zip code Branch office phone number

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

\_\_\_\_\_  
New financial advisor's ID New financial advisor's phone number

### 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

The Columbia 529 Plan is administered by the Board of Trustees of the College Savings Plans of Nevada, which is chaired by Nevada State Treasurer Kathleen Marshall. Program management services are provided by Upromise Investments, Inc. (Member NASD/SIPC). The distributor is Columbia Management Distributors, Inc. An investment in the Columbia 529 Plan is not endorsed, insured or guaranteed by the state of Nevada or any other federal or state entity.

**Columbia Management Distributors, Inc.**  
**One Financial Center, Boston, MA 02111-2621**

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