

Columbia Management.

Columbia Management Services, Inc.
800-345-6611

Duplicate Year End Statement and Tax Form Request

Use this form to request copies of historical annual account statements and tax forms. Please use additional forms if necessary to complete your request.

Requester Details:

Requester's Name _____ Daytime Phone Number: ____ - ____ - ____

Account Owner Financial Advisor Other*: _____
Please specify

Send documents to: _____

Requester's Signature: _____ Date: _____

**If you are not the account owner or the financial advisor listed on account, please contact a Columbia Management Services representative at 1-800-345-6611 for further instructions.*

Account Details:

Request #1: Year End Statement Tax Form(s) Years Needed: _____

Account Owner's Name _____ SSN # _____

Fund Name: _____ Account #: _____

Date Account Opened: _____ Please check if the account is currently open

Please check if you are requesting documents for original accounts, including Funds which may have been merged or transferred to the account requested above (i.e. all history on the referenced account)

Request #2: Year End Statement Tax Form(s) Years Needed: _____

Account Owner's Name: _____ SSN # _____

Fund Name: _____ Account #: _____

Date Account Opened: _____ Please check if the account is currently open

Please check if you are requesting documents for original accounts, including Funds which may have been merged or transferred to the account requested above (i.e. all history on the referenced account)

Research Fees:

- Prior year is free
- \$5 per year and document requested (\$100 maximum fee per account and document)
- \$100 for unknown years (Any overpayment will be refunded)

Fee Enclosed: \$ _____

Please return completed form and check, cashiers' check, or money order payable to **Columbia Management Services, Inc.** to:
Columbia Management Services, Inc.
P.O. Box 8081
Boston, MA 02266-8081