

Please return  
your completed  
form to:

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

## Class Z Eligibility Form

Please use blue or black ballpoint pen and be sure to fill out the form completely. Incomplete forms cannot be processed.

Investors interested in purchasing Columbia 529 Plan Class Z units must verify their eligibility by completing this form and attaching it to their New Account Application.

### Investor information

Account owner's name

Social Security number

Address

City

State

Zip code

Daytime telephone number

### Eligibility verification

Please certify your eligibility by selecting the appropriate box(es) and signing below:

- I am a client of a Registered Investment Advisor (RIA).
- I am an employee of Bank of America Corporation or its subsidiaries.
  - I am a family member of the above.
- I am a trustee or director of a mutual fund distributed by Columbia Management Distributors, Inc.
  - I am a family member of the above.
- I am a holder of Class Z shares of a mutual fund distributed by Columbia Management Distributors, Inc.
  - I am a family member or person listed on an account registration for any account of an above-mentioned shareholder.  
(Please provide account number and/or Social Security number associated with this account.)\_\_\_\_\_
- I am a holder of Class A shares of a mutual fund distributed by Columbia Management Distributors, Inc. that were obtained by exchanging Class Z shares.
  - I am a family member or person listed on an account registration for any account of an above-mentioned shareholder.  
(Please provide account number and/or Social Security number associated with this account.)\_\_\_\_\_
- I purchased certain no-load shares of a mutual fund that merged with a mutual fund distributed by Columbia Management Distributors, Inc.
  - I am a family member or person listed on an account registration for any account of an above-mentioned shareholder.  
(Please provide account number and/or Social Security number associated with this account.)\_\_\_\_\_

If you have any questions about your eligibility to purchase Class Z units, please call 877.994.2529.

Signature

Date

These criteria may change at any time without notice.