Scholars Choice Education Savings Plan®

Scholars Choice 🗡

Account Features Form

Scholars Choice is a registered service mark of CollegeInvest.

- Use this form to add, change, or delete Recurring Contributions and Bank Information, or to set up systematic withdrawals, systematic rebalance, or Automatic Dollar Cost Averaging on your Scholars Choice Education Savings Plan Account.
- For faster processing, you can complete this request online at scholars-choice.com.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the mailing address listed. Do not staple.

To request assistance in completing this form call us at **1-888-5-SCHOLAR** (**1-888-572-4652**), Monday through Friday from 9:00 a.m. - 10:00 p.m. ET.

1-888-5-SCHOLAR (1-888-572-4652) Monday to Friday 9:00 a.m 10:00 p.m. ET
scholars-choice.com
Regular mailing address: Scholars Choice PO Box 219372 Kansas City, MO 64121
Overnight mailing address: Scholars Choice 1001 E 101st Terrace, Suite 200 Kansas City, MO 64131

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1.	Account	Owner	Information

Account Number(s) (To list more than six Accounts, use a separate sheet.).	
Account Owner (First name)	(M.I.)
Account Owner (Last name)	
Telephone Number	

2. Recurring Contribution/Bank Update

- Complete this section to add, change, or delete a Recurring Contribution from your bank account.
- You can also add, change, or delete a Recurring Contribution by accessing your Account online at scholars-choice.com.
- To add Recurring Contribution instructions or multiple bank accounts, complete and include Section 2A and Section 3 for each Account and/or instructions.
- Your contribution will be allocated according to the standing allocation(s) on your Account.
- Recurring Contribution. You can transfer money from your bank account to your Scholars Choice Education Savings Plan Account on a set schedule. (Check all that apply.)

Add this option to my Account. (Provide the information below and in **Section 3**.)

Change the investment amount, frequency, and/or debit date on my existing Recurring Contribution. (Provide the new amount and/or debit date below.)

Note: If you wish to skip a scheduled Recurring Contribution, please call 1-888-5-SCHOLAR (1-888-572-4652).



Change the bank account information currently being used for my existing Rec (Provide the information in Section 3 .)	urring Contribution.
Delete this option. Amount of Debit:Debit: \$25 \$50 \$100 \$150 \$250	Other \$,0 0
Frequency (Select one.): Monthly Quarterly (Every three mon	Amount (\$25 minimum) ths.)
Start Date:* Date (mm-dd-yyyy)	
* Scholars Choice Education Savings Plan must receive instructions at least 3 Busin specified; otherwise, debits from your bank account will begin the following mont quarterly statements for details of these transactions. If the date is not specified, the receipt of this request, on the 20th day of the month.	h on the day specified. Please review your
Annual Increase. You may increase your Recurring Contribution automaticall be adjusted each year in the month that you specify by the amount indicated.	y on an annual basis. Your contribution will
Amount of increase: \$,	
Month**: January February March April	May June
July August September October	November December
**The month in which your Recurring Contribution will be increased. The first increased month selected. Annual Recurring Contribution increases are subject to the gene Education Savings Plan and will also count toward annual federal gift tax exclusi	ral contribution limits of the Scholars Choice
B. Add Bank. Add bank information on file, complete Section 3. We will keep your b contributions and/or withdrawals.	
Bank Information	
Complete this section if you are adding a Recurring Contribution to your Account or if you as	re changing your bank account information.
This bank account information will be available across all beneficiary's within the same account information will be available across all beneficiary's within the same account.	<u> </u>
 Recurring Contributions can be made only through accounts held by a U.S. bank, savings is a member of the Automated Clearing House (ACH) network. Money market mutual fun 	
through non-bank financial companies cannot be used. Important: I acknowledge that my bank or financial institution is located in the U.S. and/or	adheres to LLS hanking regulations
The state of the s	dunoros to o.o. burning rogulations.
Bank Name	
Bank Routing Number Bank Account Number	Account Type Checking Savings
Note: The routing number is usually located in the bottom left corner of your checks. You can als The named Bank Account Owner(s) must authorize this Recurring Contribution by signing below (
Name(s) on Bank Account	
Bank Account Owner (First name)	(M.I.)
Bank Account Owner (Last name)	
SIGNATURE	
Signature of Bank Account Owner	Date (mm-dd-yyyy)
Joint Bank Account Owner (First name)	(M.I.)
Joint Bank Account Owner (Last name)	
SIGNATURE	
Signature of Joint Bank Account Owner	Date (mm-dd-yyyy)

4. Systematic Withdrawal Program (SWP) (Optional)

- Complete this section to establish periodic withdrawals from your Scholars Choice Education Savings Plan Account.
- SWPs can be established for Qualified Distributions only. We are required to file IRS Form 1099-Q annually for distributions taken from your Scholars Choice Education Savings Plan Account.
- You can have up to two SWPs on your Account.
- If the balance of the Investment Portfolio is less than the SWP amount specified, the SWP instructions will be stopped.

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5. Automatic Dollar-Cost Averaging Program (Optional)

Automatic dollar-cost averaging allows you to reallocate from one Investment Portfolio to one or more other Investment Portfolios within your Account on a pre-scheduled basis.

- To start automatic dollar-cost averaging you must make a minimum \$250 contribution to an initial Investment Portfolio (Source Portfolio), and at the time of the contribution, designate automatic periodic allocations to one or more other Investment Portfolios (Target Portfolio).
- Your entire initial deposit does not need to be included in the automatic dollar-cost averaging.
- Creating an automatic dollar-cost averaging at the time of enrollment will NOT count towards your twice per calendar year investment
 rebalance limit. To start automatic dollar-cost averaging at the time of enrollment you must mail a contribution check with this completed
 form to the Plan.
- If you make any changes to or cancel an established automatic dollar-cost averaging it will count towards your twice per calendar year investment rebalance limit.

Amount: \$,	
Frequency (Select one.):	lendar quarter.)
Start Date:* Date (mm/dd/yyyy) — Date (mm/dd/yyyy)	
* The Plan must receive instructions at least 3 business days prior to the indicated start date. Please r for details of these transactions. If the date is not specified, this option will begin the month following the 15th day of the month.	
Stop Type (Select one.):	
Stop Date Date (mm/dd/yyyy)	
When total amount of Reallocation equals: \$	
When Complete Balance of the Source Portfolio is depleted.	
Source Portfolio:	
Target Portfolio:	
Investment Portfolio	\$ Dollar Amount
	\$
Investment Portfolio	Dollar Amount
	\$
Investment Portfolio	Dollar Amount
Systematic Rebalance (Optional)	
The Systematic Rebalance feature is only available for Unit Class A and Unit Class I.	
• The Systematic Rebalance feature offers the ability to design a customized portfolio that will remain co investment objectives over time.	nsistent with your predetermined
• Selecting this feature will automatically rebalance your portfolio on a quarterly basis in accordance with file. If you need to update your target Investment Options prior to this change, please fill out the Change	
• Adding, stopping, or restarting the Systematic Rebalance feature at any time after enrollment will coun Investment Option changes per calendar year. These changes would include adjusting the percentage a	
Add Systematic Rebalance	

Delete Existing Systematic Rebalance

7. Signature — YOU MUST SIGN BELOW

- I certify that I have read and understand, consent, and agree to all the terms and conditions of the Scholars Choice Education Savings Plan Description as they relate to adding, deleting, or changing financial features.
- By signing below, I authorize Scholars Choice Education Savings Plan or its designee to add, delete, or change financial features
 according to the instructions above.
- If I have added or changed banking information in **Section 3**, I certify that I have authority to transact on the bank account so indicated.
- If the Account is owned by an entity or trust, I certify that I am authorized to act on its behalf in making this request. If the
 Account is funded with UGMA/UTMA assets, I further certify that I am the parent/guardian/custodian of the Account identified in
 Section 1
- I certify that the information provided herein is true and complete in all respects. I understand that all changes made on this form supersede all my previous designations.
- You should be aware that by providing banking information, you also authorize the Plan to automatically provide certain
 capabilities in connection with your Account(s). This includes the ability to authorize withdrawals from your Accounts via
 telephone or through scholars-choice.com provided your banking information has been on file for a minimum of 30 days. Do not
 provide your banking information if you do not wish to activate these capabilities. If you wish to remove these capabilities from
 your account(s), you must delete your banking information.
- If I have chosen the Recurring Contribution option, I authorize the Scholars Choice Education Savings Plan and its designees, upon telephone or online request, to pay amounts representing redemptions made by me or to secure payment of amounts invested by me, by initiating credit or debit entries to my account at the bank named in **Section 3**. I authorize the bank to accept any such credits or debits to my account without responsibility to their correctness. I acknowledge that the origination of ACH transactions involving my bank account must comply with U.S. law. I further agree that none of the Scholars Choice Education Savings Plan, CollegeInvest, the Colorado Department of Higher Education, Nuveen Securities LLC., TIAA-CREF Tuition Financing, Inc., Ascensus College Savings Recordkeeping Services, LLC and its affiliates will incur any loss, liability, cost, or expense for acting upon my telephone or online request. I understand that this authorization may be terminated by me at any time by notifying Scholars Choice Education Savings Plan and the bank by telephone or in writing, and that the termination request will be effective as soon as Scholars Choice Education Savings Plan and the bank have had a reasonable amount of time to act upon it. I certify that I have authority to transact on the bank account identified by me in **Section 3**.

SIGNATURE	
Signature of Account Owner or Authorized Representative of Entity	Date (mm-dd-yyyy)

