

FutureScholar

529 College Savings Plan



Automatic Contribution Plan / Electronic Bank Transfer Form

Login online at www.futurescholar.com or use this form to:

- Change or add your banking information on file for contributions
- Change or add your banking information on file for withdrawals
- Establish, modify, or terminate Automatic Contribution Plan.

Please note, if you wish to make a withdrawal to a newly added bank account within 14 days, you will be required to obtain a Medallion Guarantee Stamp in the signature section. If you do not intend to request a withdrawal within 14 days, only a notarized signature will be required in the signature section along with proof of bank registration which may include a voided check, deposit slip or bank statement.

If you have questions completing this form, please call us toll free at **1.888.244.5674**, Monday through Friday, 8:00 a.m. to 7:00 p.m. (ET).

Regular Mail:

Future Scholar 529 Plan
P.O. Box 219812
Kansas City, MO 64121-9812

Overnight Mail:

Future Scholar 529 College Savings Plan
801 Pennsylvania Ave STE 219812
Kansas City, MO 64105-1307

I. Current Account Information

A. Designated Beneficiary's Account Information

Current Account Number

Designated Beneficiary's First Name

Middle Initial

Last Name

Designated Beneficiary's Social Security Number

Date of Birth (MM/DD/YY)

B. Account Owner Information

If not an individual, indicate the type of entity (e.g., a trust) and insert the entity's legal name.

Primary Account Owner's First name (or entity name)

Middle Initial

Last Name

Social Security number or Taxpayer Identification Number

Date of Birth (MM/DD/YY)

Joint Account Owner's First Name

Middle Initial

Last Name

Mobile Phone Number

Home Phone Number

II. Telephone and Online Privileges

Unless otherwise indicated below, you authorize Future Scholar to accept instructions from you, by telephone and online. All telephone transaction calls are recorded. Future Scholar 529 College Savings Plan will accept telephone and online instructions from any person identifying themselves as the owner of the account to transfer shares via electronic bank transfer between the 529 account and the bank account provided in Section III. Withdrawals over the phone and online can be processed once a bank account has been on file for 14 days with a notarized signature. If you wish to make a withdrawal to a newly added bank account within 14 days, a Medallion Guarantee Stamp will be required in the signature section.

Telephone and online instructions will be accepted unless otherwise indicated below:

- I do **NOT** authorize contributions to my Future Scholar account from the bank account listed in Section III.
- I do **NOT** authorize withdrawals from my Future Scholar account to the bank account listed in Section III.

III. Bank Instructions

To add or update a bank account linked to your Future Scholar 529 account for subsequent contributions, withdrawals or for use with the Automatic Contribution Plan, please complete this section. Please note, only a bank account registered in the name of the account owner or beneficiary may be added to your account. Your bank must be a member of the Automated Clearing House System to use these services.

Please also attach proof of bank registration in the form of a voided check, deposit slip or bank statement to this form.

- Check this box if you wish to remove your existing bank(s) on file and replace with the new bank information provided below.
- Check this box if you wish to add the new bank listed below while retaining your existing bank(s) on file. Please note that the new bank will be the default bank on file.

Account type: Checking Savings

Bank Name

Bank account number (Do not use spaces or dashes)

Bank routing number (your bank can provide this)

Name of bank account owner

Name of joint owner, if applicable

Bank account owner(s) authorization

Signature of bank account owner

Signature of bank account co-owner

J. Smith		0001
123 Main Street		_____ 20__
Anytown, USA 12345		
PAY TO THE		
ORDER OF _____		\$ _____
		_____ DOLLARS
Your Bank		
Memo _____		
123456789	123456789	0001
Routing Number	Account Number	

