



- Use this form when requesting a change of account owner, custodian, beneficiary, successor owner(s) or successor custodian on your CollegeAmerica account.
- All existing account options will be removed if you are changing the account owner, custodian or beneficiary and transferring the entire balance. To retain your account options, complete the *CollegeAmerica Account Options* form or call us at **(800) 421-4225, ext. 529**.
- If the account owner/custodian is changing his or her name, obtain and complete a *Name Change Request*.
- If you want to change the custodian of a 529 account funded with UGMA/UTMA assets, call us.
- If the current account owner/custodian is deceased, call us. **The new account owner/custodian must sign Sections 8 and 9.**
- If transferring ownership to a corporation, partnership or other entity, call us for details and additional documentation that may be required.

1 Current account owner or custodian

The account owner or custodian is the individual controlling a CollegeAmerica account.

First name of current account owner or custodian MI Last () Daytime phone

Address City State ZIP

Name of current beneficiary Account number

☐ Check here if the account is invested in 529 F-2 shares.

2 Account owner or custodian change

Consult a tax advisor regarding the tax consequences of any account owner or custodian change.

The new account owner or custodian must sign Section 8, and if the current account owner/custodian is deceased, Section 9. A signature guarantee may be required.

- Notes:**
- The new account owner/custodian should name a new successor owner(s)/custodian in **Section 5**. The current successor owner(s)/custodian will be removed upon transfer of ownership.
 - Complete **Section 6** to change or retain financial professional information.
 - If the new account owner/custodian is an entity or trust, provide the personal information below for the person acting on behalf of the entity or trust. If additional space is needed, attach a separate page. For a trust, you must submit the title page, the signature page and the page assigning the trustee(s).

New account owner/custodian information

SSN Date of birth (mm/dd/yyyy) Country of citizenship

First name (owner, trustee or custodian) MI Last

Residence address (physical address required — **no P.O. boxes**) City State ZIP

Mailing address (if different from residence address) City State ZIP

Email address* () Daytime phone

Entity/trust name (if applicable)

TIN of entity/trust Date of trust (if applicable) (mm/dd/yyyy)

*Your privacy is important to us. For information on our privacy policies, visit www.capitalgroup.com.



3 Beneficiary change

The beneficiary is the person on whose behalf the account is opened and who is entitled to receive its benefits. The current account owner or custodian must sign in Section 9.

Note: The current successor owner(s) will remain the successor owner(s) for the new account unless Section 5 is completed.

Beneficiary information

Name of current beneficiary _____

The new beneficiary must be a member of the current beneficiary's family and either a U.S. citizen or resident alien. If the new beneficiary is not a member of the family, this change will be treated as a withdrawal, and the transaction will be subject to federal income tax and a 10% federal penalty tax on earnings. A member of the beneficiary's family is: **1)** a son or daughter or a descendant of either; **2)** a stepson or stepdaughter; **3)** a brother, sister, stepbrother or stepsister; **4)** a father or mother or an ancestor of either; **5)** a stepfather or stepmother; **6)** a brother or sister of the father or mother; **7)** a son or daughter of a brother or sister; **8)** a son-in-law, daughter-in-law, father-in-law, mother-in-law, brother-in-law or sister-in-law; **9)** the spouse of the beneficiary or the spouse of any individuals described above; or **10)** a first cousin of the beneficiary. All legally adopted children are treated as children of the adoptive parent by blood, and the terms brother and sister include half-brothers and half-sisters.

SSN of new beneficiary

Date of birth of new beneficiary (mm/dd/yyyy)

Country of citizenship _____

First name of new beneficiary (print) _____

MI _____

Last _____

If the new beneficiary has an existing American Funds CollegeAmerica account, list that account number here _____

If you do not have an existing American Funds CollegeAmerica account, a new account number will be assigned.

☐ Check this box if the new beneficiary is not a member of the current beneficiary's family.



4 Transfer instructions

Complete this section if a new account owner or custodian was named in Section 2 and/or a new beneficiary was named in Section 3.

☐ Transfer the entire amount from the CollegeAmerica account listed in Section 1 to the new account.

OR

☐ Transfer the following amount(s) from the CollegeAmerica account listed in Section 1 to the new account:

Fund name or number	Amount	Percentage
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%

Note: Funds will be transferred in kind to the new or existing account in the same share class(es), fund(s) and percentage(s) as they were withdrawn, unless otherwise instructed below.

New investment instructions:

Fund name or number	Amount	Percentage
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%
_____	\$ _____	OR _____%



5 Successor owner(s) or successor custodian change

Complete either **A** or **B** in this section. This section does not apply to corporate and trust accounts.

- Notes:**
- If a new account owner has been named in Section 2, complete **A** below.
 - If a new custodian has been named in Section 2, complete **B** below.

A. The new **primary successor owner** must be at least age 18 and a U.S. citizen or legal U.S. resident, becomes the owner of the account in the event the account owner dies, and cannot be the same person as the account owner. A successor owner cannot be named for an account funded with UGMA/UTMA assets.

_____	_____	_____	<div><div></div><div></div></div> - <div><div></div><div></div></div> - <div><div></div><div></div><div></div><div></div></div>
First name of new primary successor owner	MI	Last	Date of birth of primary successor owner (mm/dd/yyyy)

The **contingent successor owner** must be at least age 18 and a U.S. citizen or legal U.S. resident, becomes the owner of the account in the event the primary successor owner predeceases the account owner, and cannot be the same person as the account owner or primary successor owner. If adding or changing a contingent successor owner, you must also complete the primary successor owner field above. A successor owner cannot be named for an account funded with UGMA/UTMA assets.

_____	_____	_____	<div><div></div><div></div></div> - <div><div></div><div></div></div> - <div><div></div><div></div><div></div><div></div></div>
First name of contingent successor owner	MI	Last	Date of birth of contingent successor owner (mm/dd/yyyy)

B. A new **successor custodian** can only be designated if allowed in the state where the UGMA/UTMA is established (for accounts funded with UGMA/UTMA assets only).

_____	_____	_____	<div><div></div><div></div></div> - <div><div></div><div></div></div> - <div><div></div><div></div><div></div><div></div></div>
First name of new successor custodian	MI	Last	Date of birth of new successor custodian (mm/dd/yyyy)

Relationship of new successor custodian to minor

Name of witness (print)

X

Signature of witness

Note: The witness cannot be the current or new custodian or the person named as successor custodian above.

This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

6

Financial professional/Firm

If you are affiliated with a broker-dealer firm, provide the information in A. If you are affiliated with a Registered Investment Advisor (RIA) firm, provide the information requested in B.

Important: If a new account owner or custodian has been named in **Section 2**, this section must be completed to change or retain financial professional/firm information.

A. Financial professional/Broker-dealer firm

We authorize American Funds Service Company® (AFS) to act as our agent for this account and agree to notify AFS of purchases made under a Statement of Intention or Rights of Accumulation. If applicable, we have provided a copy of our SEC Form CRS to the account owner/custodian named in Section 2.

_____	_____	_____	()	_____
Name(s) of professional(s)	Professional/team ID #	Branch number	Daytime phone	Ext.

_____	_____	_____	_____
Branch address	City	State	ZIP

_____	X
Name of broker-dealer firm (as it appears on the Selling Group Agreement)	Signature of person authorized to sign for the broker-dealer — required

B. Investment Advisor Representative (IAR)/RIA firm

IAR information

_____	_____
Name of IAR	Financial professional number*

_____	_____	_____	_____
Address (if different from firm address)	City	State	ZIP

_____	()	Ext.	()
Email address	Daytime phone (if different from firm)	Fax	

RIA firm information

_____	_____	()	Ext.
Name of RIA firm (as it appears on Form ADV or home office)	Firm number*	Daytime phone	

_____	_____	_____	_____
Firm address	City	State	ZIP

801-	_____	_____
SEC number	IARD/CRD number	State registration and number

By signing below, I certify that the firm listed above: **1)** has a current Form ADV filed with the U.S. Securities and Exchange Commission or a state regulatory agency; **2)** is providing investment advisory services to the account owner/custodian named in Section 2; **3)** if applicable, has provided a copy of SEC Form CRS to the account owner/custodian named in Section 2; and **4)** indemnifies and holds harmless American Funds Service Company and any of its affiliates or mutual funds managed by such affiliates; and each of their respective directors; trustees; officers; employees; and agents for any losses, expenses, costs or liability (including attorney fees) that may be incurred as a result of misrepresentations or omissions by the firm in connection with the firm making American Funds available to its clients.

X	_____	_____ / _____ / _____
Signature of person authorized to sign for the RIA — required	Date	(mm/dd/yyyy)

* Financial professional number or firm number may be assigned by American Funds. If you are an Investment Advisor Representative (IAR) and need assistance, call **(800) 421-5450**.



7 Additional options — if applicable

If a new account owner or custodian has been named in Section 2, this section should be presented to them for review.

A. Telephone and website exchange and redemption privileges will automatically be enabled on your account unless you decline below. To decline these privileges, read the individual statements and check the applicable box(es).

Note: If either option is declined, no one associated with this account, including your financial professional, will be able to request exchanges or redemptions by telephone or via the website. Requests would need to be submitted in writing.

Exchanges: I **DO NOT** want the option of using the telephone and website exchange privilege. ☐

Redemptions: I **DO NOT** want the option of using the telephone and website redemption privilege. ☐

Important note:

IRS rules limit changes in 529 investment strategy to two per year. You may establish an automatic exchange or rebalance plan at the time of account setup. Adding or changing an automatic exchange or rebalance plan on an existing account will be considered a change in investment strategy. The request may be denied if a change in investment strategy exceeds two per year. Refer to the *CollegeAmerica Program Description* for additional information or speak with a financial professional. You may only exchange from one fund to another or rebalance funds within the same share class.

B. Rights of Accumulation (cumulative discount)

Account owner, spouse and children under 21 or disabled adult children with ABLE accounts can aggregate accounts to reduce sales charges. Any share classes within these accounts will contribute toward a reduced sales charge. The Social Security or account numbers on these accounts are:

Note: Purchases in the money market fund **do not apply** toward a Class A share Rights of Accumulation.

C. Automatic exchange and rebalance plans (optional) — requires additional paperwork

To avoid delays in establishing these options, you must attach a completed *CollegeAmerica Account Options* form.

Check all that apply.

☐ Establish an automatic exchange plan (Section 5-A of the *Account Options* form).

☐ Establish an automatic rebalance plan (Section 5-B of the *Account Options* form).



8 Signature of new CollegeAmerica account owner/custodian — if applicable

The new account owner or custodian named in Section 2 must sign this section. If the current account owner/custodian is deceased, the new account owner/custodian must also sign Section 9. A signature guarantee may be required.

I hereby establish a CollegeAmerica account with Virginia529SM through American Funds and acknowledge that I have received, read and agree to the terms set forth in the *CollegeAmerica Program Description*, the prospectus(es) of the fund(s) selected and this document, as these documents may be modified from time to time. I authorize the instructions set forth in this document. I understand that I and all shareholders at my address will receive one copy of fund documents (such as annual reports and proxy statements) unless I opt out by calling (800) 421-4225.

I agree to hold harmless and indemnify Virginia529; American Funds Service Company (AFS); any of their affiliates or mutual funds managed by such affiliates; and each of their respective directors; trustees; officers; employees; and agents from any losses, expenses, costs or liability (including attorney fees) that may be incurred in connection with these document instructions, the exercise of the telephone and website exchange and/or redemption privileges or in connection with the establishment of an account with a minor account owner.

I authorize the financial professional assigned to my account in Section 6-A, or the IAR assigned to my account in Section 6-B, to have access to my account and to act on my behalf with respect to my account. If applicable, I acknowledge that I have received and read a copy of my financial professional's SEC Form CRS. I certify that I, as well as the beneficiary and the successor owner(s)/custodian named in this document, are either U.S. citizens or legal residents. I understand that to comply with federal regulations, information provided on this document will be used to verify my identity. For example, my identity may be verified through the use of a database maintained by a third party. If AFS is unable to verify my identity, I understand it may need to take action, possibly including closing my account and redeeming the shares at the current market price and that such action may have tax consequences, including a tax penalty.

If this document is signed electronically, I consent to be legally bound by this document and subsequent terms governing it. The electronically signed copy of this document should be considered equivalent to a printed form in that it is the true, complete, valid, authentic and enforceable record of the document, admissible in judicial or administrative proceedings. I agree not to contest the admissibility or enforceability of the electronically stored copy of this document. A copy of this document will be made available to me as required.

X

Signature of new account owner/custodian or signature of successor owner/custodian
if current account owner/custodian is deceased

_____/_____/_____
Date (mm/dd/yyyy)

This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.



9 Signature of current CollegeAmerica account owner/custodian — required

The current account owner or custodian must sign this section. If the current account owner/custodian is deceased, the new account owner/custodian must sign this section.

- Notes:**
- If the current account owner is deceased and the current primary successor owner is taking ownership of the account, a signature guarantee is not required. **If a new account owner or custodian was named in Section 2 for any other reason, a signature guarantee is required.**
 - Other scenarios may require a signature guarantee. Call us at **(800) 421-4225, ext. 529** for more information.

I direct AFS to make changes to my CollegeAmerica account in the manner that I have indicated on this form, and I assume sole responsibility for any tax consequences. I certify that the instructions and information provided herein are true and correct.

X

Signature of current account owner/custodian or signature of successor owner/custodian
if current account owner/custodian is deceased

Date / /
(mm/dd/yyyy)

This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

Stamp signature or medallion guarantee here.

If required, signatures must be guaranteed by a bank, savings association, credit union, member firm of a domestic stock exchange or the Financial Industry Regulatory Authority that is an eligible guarantor institution. **A notary public is NOT an acceptable guarantor.** The guarantee must be in the form of a stamp or a typewritten or handwritten guarantee that is accompanied by a raised corporate seal.

If a signature guarantee is required, this form must be mailed.

CollegeAmerica is a nationwide plan sponsored by **Virginia529™**

If mailing, choose the service center for your state. Mail the form to the Indiana Service Center if you live outside the U.S.



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P.O. Box 6273
Indianapolis, IN 46206-6273

Overnight mail address
12711 N. Meridian St.
Carmel, IN 46032-9181



American Funds Service Company
P.O. Box 2713
Norfolk, VA 23501-2713

Overnight mail address
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Norfolk, VA 23513-2430

Investor upload www.capitalgroup.com/submit

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For more information, contact your financial professional, visit www.capitalgroup.com or call us at (800) 421-4225, ext. 529.