



**Edvest**<sup>SM</sup>  
 WISCONSIN'S COLLEGE  
 SAVINGS PLAN

**Edvest College Savings Plan  
 Automatic Investment/Electronic Bank Transfer Form**

**Questions?** Call toll-free 1.888.338.3789  
 Or write to the Plan at P.O. Box 219437, Kansas City, MO 64121-9437  
 Visit [www.Edvest.com](http://www.Edvest.com)

**Instructions.**

- Print in capital letters using blue or black ink, sign and date the form and mail it to the Plan at the above address. You must include a preprinted voided check or a preprinted deposit slip to add or change bank information.
- A Signature Validation Program (SVP) Stamp is required for certain entity Account Owners or Accounts for which the individual completing this form is acting in a legal capacity as a representative of the individual Account Owner as described in Section 7.

**1 Account Information** *(You must provide all requested information.)*

<table border="1" style="width:100%; height: 20px; border-collapse: collapse;"> <tr><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td></tr> </table> <p style="text-align: center; font-size: small;"><i>Plan Account Number</i></p>																				<table border="1" style="width:100%; height: 20px; border-collapse: collapse;"> <tr><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td><td style="width:3.33%;"></td></tr> </table> <p style="text-align: center; font-size: small;"><i>Telephone Number</i></p>																				
<p style="font-size: small;"><i>Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name</i></p>																																								
<p style="font-size: small;"><i>Account Owner Email Address</i></p>																																								
<p style="font-size: small;"><i>Beneficiary Name (First, MI, Last, Suffix)</i></p>																																								

**2 What would you like to do?** *(Check all that apply.)*

<b>Automatic Contribution Plan (ACP)</b> (From Account owner or third-party bank account)			
<input type="checkbox"/> Establish	<input type="checkbox"/> Modify	<input type="checkbox"/> Delete	<input type="checkbox"/> Change bank information
<b>Account Owner Bank Account Information</b>			
<input type="checkbox"/> Establish	<input type="checkbox"/> Delete	<input type="checkbox"/> Change bank information	
<b>Third-Party Banking Information</b>			
<input type="checkbox"/> Establish	<input type="checkbox"/> Delete	<input type="checkbox"/> Change bank information	

**3 Banking Information**

**Use this section if the Plan Account Owner's name appears on the bank account registration**  
 You must provide the following information if you choose to contribute through the Automatic Contribution Plan (ACP) or the Electronic Purchase Option. Separate withdrawals from your bank account will be made for each Investment Option you have selected. Provide a preprinted voided check or preprinted deposit slip along with this form.

<p><b>Type of Account</b> <i>(check one):</i></p> <p style="text-align: center;"> <input type="checkbox"/> Checking  <input type="checkbox"/> Savings         </p>	
<b>Account Number:</b>	<b>Routing Number:</b>
<p><b>Name(s) on Account</b>  <i>(The Account Owner, Custodian or Entity name must appear on the bank account.)</i></p>	
<b>Bank Name:</b>	<b>Telephone Number:</b>

## 4 Contributions From Third-Party Bank Accounts (Complete if applicable.)

The following information must be provided if a third party (*i.e.*, a person other than you as the Account Owner) wishes to make one or more contributions to the Account by authorizing the Plan to directly withdraw amounts from his or her bank account. If the third party previously authorized such withdrawals from his or her bank account, this section may also be used to change the third-party's personal information, bank information and/or withdrawal instructions. All of the information requested in this section must be provided, including the third-party's signature and a Signature Validation Program Stamp or Medallion Signature Guarantee Stamp.

The third party may authorize the Plan to debit his or her bank account as a one-time electronic funds transfer or periodically through an Automatic Contribution Plan. The third party may cancel future withdrawals from his or her bank account at any time by contacting the Plan Manager.

**The third party will not retain any rights with respect to amounts contributed to the Account.** The Participant becomes the legal owner of any amounts contributed to the Account by the third party. The contribution(s) will be allocated in accordance with the Participant's standing Allocation Instructions. The Plan **will not** permit withdrawals from the Account to be directly deposited into the third-party's bank account.

Quarterly Account statements and confirmation statements are sent only to the Plan Account Owner unless a completed Authorization to receive Plan Information form has been received by the Plan with instructions to send Account statements or confirmation statements to a third party. Contributors should retain and review bank account statements regarding contributions made to the Plan.

### Third-Party's Personal Information

Name (First, MI, Last, Suffix)

Residential Address (this must be a street address - a P.O. Box is not acceptable)

Residential Address City

State

Zip Code

Mailing Address, if different from the above address

Mailing Address City

State

Zip Code

Social Security Number or Taxpayer Identification Number

Gender (M/F)

Date of Birth (mm-dd-yyyy)

Day Telephone Number

Evening Telephone Number

### Third-Party's Bank Information

Type of Account (check one):	<input type="checkbox"/> Checking
	<input type="checkbox"/> Savings
Account Number:	Routing Number:
Name(s) on Account (the third-party's name must appear on the bank account):	
Bank Name:	Bank Telephone Number:

### Third-Party Signature and Authorization

**By signing below**, I authorize the Plan, as applicable, to debit my bank account, or to change information associated with withdrawals that I previously authorized, as provided in this section of this form. I also hereby authorize the financial institution holding the bank account to debit without responsibility for the accuracy of the transaction. I further agree that neither the Plan nor its agents will be liable for any loss, liability, cost or expense for acting upon these instructions, except to the extent required by applicable law.

As a person other than the Account Owner for the Account to which the contribution(s) will be made, I understand that I will not retain any rights with respect to the amounts withdrawn from my bank account once they are credited to the Account. I further understand that once the amounts withdrawn from my bank account are credited to the Account, the Account Owner becomes the rightful owner of all such amounts and retains full control thereof.

## Signature and Notarization are Required to Add Third Party Bank Instructions

Signature of Third Party	Date
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The undersigned has read the foregoing in its entirety before signing. IN WITNESS WHEREOF, I have hereunto set my hand this

\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Signature of Third Party Bank Account Owner

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

This instrument was acknowledged before me on \_\_\_\_\_ (date)  
by \_\_\_\_\_  
(name of person).

\_\_\_\_\_  
Notary Public (Seal)

My term expires: \_\_\_\_\_

### 5 Automatic Contribution Plan (ACP) Instructions

#### Contribution Amount

\$  .00

#### Investment Dates

*If none selected, then your bank withdrawals will occur monthly.*

<input type="checkbox"/> Biweekly	<input type="checkbox"/> Monthly	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Other
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#### Month(s)

**Select the month(s) you would like your Automatic Contributions made (you must select at least one).**

*If none selected and your frequency is quarterly, then your bank withdrawals will occur every calendar quarter.*

<input type="checkbox"/> Every Month (or →)	<input type="checkbox"/> Jan.	<input type="checkbox"/> Feb.	<input type="checkbox"/> Mar.
	<input type="checkbox"/> Apr.	<input type="checkbox"/> May	<input type="checkbox"/> Jun.
	<input type="checkbox"/> Jul.	<input type="checkbox"/> Aug.	<input type="checkbox"/> Sep.
	<input type="checkbox"/> Oct.	<input type="checkbox"/> Nov.	<input type="checkbox"/> Dec.

#### Date(s)

**Enter the day(s) of each month you would like your Automatic Contributions made (you must enter at least one date).** *If none selected, then your bank withdrawals will occur on the fifth of each month or quarter selected above.*

Required:	Additional Day(s) (optional)
Day 1	Day 2
	Day 3
	Day 4

### 6 Allocation Instructions

*(Check one box.)*

- Use my current allocation instructions on file for future contributions.
- Establish or change my allocation instructions as indicated below for my future contributions.
  - Use a whole percentage next to each Investment Option below. The TOTAL of all allocations must equal 100%.
  - The Plan will apply these allocation instructions to future Automatic Contribution Plan (ACP) contributions.
  - These allocation instructions will not apply to payroll contributions, if any.

You can change your Allocation Instructions online, by telephone or by form at any time.

<b>Investment Option Name</b> (Investment Option Code)	<b>Whole Percentage</b> (per Investment Option)	<b>Check if new Investment Option</b> <sup>1</sup>
Age-Based Option	%	<input type="checkbox"/> New Option
Aggressive Age-Based Option	%	<input type="checkbox"/> New Option
Index-Based Aggressive Portfolio (3427)	%	<input type="checkbox"/> New Option
Index-Based Moderate Portfolio (3429)	%	<input type="checkbox"/> New Option
Index-Based Conservative Portfolio (3430)	%	<input type="checkbox"/> New Option
Active-Based Aggressive Portfolio (3432)	%	<input type="checkbox"/> New Option
Active-Based Moderate Portfolio (3434)	%	<input type="checkbox"/> New Option
Active-Based Conservative Portfolio (3435)	%	<input type="checkbox"/> New Option
Balanced Portfolio (3437)	%	<input type="checkbox"/> New Option
Large-Cap Stock Index Portfolio (3438)	%	<input type="checkbox"/> New Option
Small-Cap Index Portfolio (3439)	%	<input type="checkbox"/> New Option
International Equity Index Portfolio (3440)	%	<input type="checkbox"/> New Option
Bond Index Portfolio (3441)	%	<input type="checkbox"/> New Option
U.S. Equity Active Portfolio (3442)	%	<input type="checkbox"/> New Option
Social Choice Portfolio (3444)	%	<input type="checkbox"/> New Option
Bank CD Portfolio (3445)	%	<input type="checkbox"/> New Option
Principal Plus Interest Portfolio (3446)	%	<input type="checkbox"/> New Option
<b>TOTAL</b>	<b>100%</b>	

## 7 Signature and Authorization *(You must sign this section for these changes to take effect.)*

- I certify that all of the information provided by me on this form is true, complete and accurate.
- I certify that I have the authority to transact on the bank account listed by me in Section 4.
- I authorize the *Edvest College Savings Plan* to act on my instructions above, including to debit my bank account and to deposit such funds into my Plan Account, or to cease such debits, as requested on this form. If I authorize contributions through the Automatic Contribution Plan (ACP) or the Electronic Purchase Option on this form, I also hereby authorize the financial institution holding the bank account to any such debits to my Account without responsibility for the accuracy of the transaction. I further agree that neither the *Edvest College Savings Plan* nor its agents or contractors will be liable for any loss, liability, cost or expense for acting upon these instructions.

**For Entity Accounts**, if I am signing on behalf of an entity, I certify I am authorized by the entity Account Owner identified in Section 1 to act on its behalf.

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*Account Owner, Custodian or Authorized Representative of Entity*

*Date*

### Important Information

A Signature Validation Program (SVP) Stamp is required for all entity Accounts except accounts owned by a trust so long as current trust documents naming all trustees are on file with the Program and may be required for Accounts for which the individual completing this form is acting in a legal capacity as a representative of the individual Account Owner. You may be required to provide proof of your authority to act on behalf of this Account to your bank or broker before a Signature Validation Program Stamp will be provided.

**Note:** The Signature Validation Program Stamp is not required if a *Plan Power of Attorney Form* is on file for an Individual Account, or if a *Plan Power of Attorney Form* accompanies this form.

**AFFIX STAMP HERE**

**Mail this form to:**

**Overnight Mail**  
Edvest College Savings Plan  
430 W 7<sup>th</sup> Street, Suite 219437  
Kansas City, MO 64105-1407

**Regular Mail**  
Edvest College Savings Plan  
P.O. Box 219437  
Kansas City, MO 64121-9437



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<sup>1</sup> If a new Investment Option is opened, a different option number will be assigned. You can also use the Additional Contribution by Mail form to contribute by check at any time.