



Residential Address City

Grid for Residential Address City

State

Grid for State

Zip Code

Grid for Zip Code

Telephone Number

Grid for Telephone Number

Mailing Address (If different than above)

Grid for Mailing Address

Mailing Address City

Grid for Mailing Address City

State

Grid for State

Zip Code

Grid for Zip Code

### 4 Add, Change or Revoke Successor Owner Information

The Successor Owner will become the Account Owner in the event of the Account Owner's death. If no Successor Owner is designated, the Account will generally be deemed assets of the Account Owner's estate. Custodians of UGMA/UTMA Accounts should refer to the Plan Disclosure Booklet regarding limitations surrounding the designation of a Successor Owner.

Please check the appropriate box:

Form with three checkboxes: Add a Successor Owner for the first time, Change an existing Successor Owner designation, Revoke a Successor Owner designation

### New Successor Owner Information (Complete this section only to add or change a Successor Owner)

Name (First, MI, Last, Suffix or Entity Name) (Foreign trusts are not eligible)

Grid for Name

Social Security Number or Taxpayer ID Number

Grid for Social Security Number or Taxpayer ID Number

Gender (M/F)

Grid for Gender

Date of Birth (mm-dd-yyyy)

Grid for Date of Birth

### 5 Change of Designated Beneficiary

The Designated Beneficiary must be a U.S. citizen or resident alien and must have a Social Security Number or Taxpayer Identification Number. Unless otherwise indicated below, all existing investments will be transferred into an Account in the new Designated Beneficiary's name. By completing this section, you intend to change the Designated Beneficiary to a Member of the Family of the current Designated Beneficiary, as defined by Section 529 of the Internal Revenue Code. This change is not permissible if it would cause the Maximum Contribution Limit to be exceeded. Please refer to the Disclosure Booklet for information about the Maximum Contribution Limit. You will be notified if the intended change would cause this limit to be exceeded. Only one Account may be opened for each Designated Beneficiary.

### Existing Designated Beneficiary Information

Name (First, MI, Last, Suffix)

Grid for Name

Account Number

Grid for Account Number

Social Security Number or Taxpayer ID Number

Grid for Social Security Number or Taxpayer ID Number

Gender (M/F)

Grid for Gender

Date of Birth (mm-dd-yyyy)

Grid for Date of Birth

### New Designated Beneficiary Information

Name (First, MI, Last, Suffix)

Grid for Name

Account Number, if any

Grid for Account Number

Social Security Number or Taxpayer ID Number

Grid for Social Security Number or Taxpayer ID Number

Gender (M/F)

Grid for Gender

Date of Birth (mm-dd-yyyy)

Grid for Date of Birth

Relationship to Existing Designated Beneficiary

Grid for Relationship to Existing Designated Beneficiary

Check this box if the New Designated Beneficiary lives with the Account Owner. If so, do not provide an address in the boxes below.

Residential Address (This must be a street address -- a P.O. Box is not acceptable under the U.S. Patriot Act.)

Grid for Residential Address



**Name(s) on Account** (The Account Owner's, Custodian or Entity or Designated Beneficiary's name must appear on the bank account, as applicable)

**Bank Name:**

**Bank Telephone Number:**

## 7 Automatic Contribution Plan

**Type of Automatic Contribution Plan Change** (check one)

- Add new Automatic Contribution Plan (provide instructions below)
- Modify Automatic Contribution Plan currently on file (provide instructions below)
- Delete Automatic Contribution Plan currently on file

**Contribution Amount**

\$ .00

**Investment Dates**

If none selected, then your bank withdrawals will occur monthly. If bi-weekly is selected, then your bank withdrawals will occur every other week. If quarterly is selected, then your bank withdrawals will occur in March, June, September, and December.

Bi-weekly     Monthly     Quarterly     Other

If "Monthly," please select the day each month that your bank withdrawals will occur.

If none selected, then your bank withdrawals will occur on the fifth of each month.

**Day of the Month**

If "Quarterly," please select the dates for quarterly contributions by entering the day in March, June, September, and December that your bank withdrawals will occur.

If none selected, then your bank withdrawals will occur on the fifth of March, June, September, and December.

	March	June	Sept	Dec
Date				

If "Other," please select the month(s) and day(s) your automatic contributions will be made (you must select at least one month and one day for each month).

Every Month (or →)     Jan.     Feb.     Mar.     Apr.  
 May     June     July     Aug.  
 Sept.     Oct.     Nov.     Dec.

**Day of Each Month**

## 8 Allocation Instructions

Establish or change my Allocation Instructions as indicated below for my future contributions.

- Use a whole percentage next to each Investment Portfolio below. The TOTAL of all allocations must equal 100%.
- You can change your Allocation Instructions online, by telephone, or by form at any time.

**Select the Class of Units to be purchased**

- Class A Units with initial sales charge.
- Class C Units with contingent deferred sales charge.
- Class A Units with waived initial sales charge. (Please indicate reason below.)
  - Current or retired employee or director of eligible dealer/firm, or immediate family member of any such person (identify dealer/firm below)
  - Fee-based Account
  - Employee of Selling Institution or immediate family member of any such person (identify dealer/firm below): By checking this box, I certify that I am an employee for at least the last 90 days of a Selling Institution, or an immediate family member of

any such person, and therefore qualify to purchase Class A Units at Net Unit Value as outlined in the Disclosure Booklet and the Participation Agreement.

Investment Portfolio	Whole Percentage <i>(per Investment Portfolio)</i>
Age-Based Investment Portfolio	%
Capital Appreciation Portfolio <i>(Class A Fund 6518) (Class C Fund 6519)</i>	%
Conservative Allocation Portfolio <i>(Class A Fund 6520) (Class C Fund 6521)</i>	%
Oakmark International Portfolio <i>(Class A Fund 6522) (Class C Fund 6523)</i>	%
Santa Barbara Dividend Growth <i>(Class A Fund 6524) (Class C Fund 6525)</i>	%
Harding Loevner Global Equity <i>(Class A Fund 6526) (Class C Fund 6527)</i>	%
Nuveen Strategic Income Portfolio <i>(Class A Fund 6528) (Class C Fund 6529)</i>	%
Nuveen Inflation-Linked Portfolio <i>(Class A Fund 6530) (Class C Fund 6531)</i>	%
Principal Plus Interest Portfolio <i>(Class A fund 6532) (Class C Fund 6533)</i>	%
MetWest Total Return Bond Portfolio <i>(Class A Fund 6534) Class C Fund 6535)</i>	%
TIAA Large Cap U.S. Equity Index Portfolio <i>(Class A Fund 6536) (Class C Fund 6537)</i>	%
TIAA U.S. Small Cap Portfolio <i>(Class A Fund 6538) (Class C Fund 6539)</i>	%
TIAA Large Cap Value Portfolio <i>(Class A Fund 6540) (Class C Fund 6541)</i>	%
Harbor Capital Appreciation Portfolio <i>(Class A Fund 6542) (Class C Fund 6543)</i>	%
Ariel Portfolio <i>(Class A Fund 6544) (Class C Fund 6545)</i>	%
DFA Emerging Markets Portfolio <i>(Class A Fund 6546) (Class C Fund 6547)</i>	%
Nuveen Alternative Income Portfolio <i>(Class A Fund 6548) (Class C Fund 6549)</i>	%
TIAA Social Choice Equity Portfolio <i>(Class A Fund 6550) (Class C Fund 6551)</i>	%
TIAA Social Choice Bond Portfolio <i>(Class A Fund 6552) (Class C Fund 6553)</i>	%
Nuveen Real Asset Income Portfolio <i>(Class A Fund 6554) (Class C Fund 6555)</i>	%
<b>TOTAL</b>	<b>100%</b>

**9 Reduced Sales Charge** *(This option is applicable for purchases of Class A Units only.)*

**Rights of Accumulation**

I already own Class A and/or Class C units in MAP which may entitle my purchases to have a reduced initial sales charge under provisions in the Disclosure Booklet.

Existing Account Number

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Existing Account Number

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**Letter of Intent (LOI)**

By checking the box above, I understand that my purchases made within a period of 13 months for this Account or my other Accounts (for either Class A or Class C Units, or both) will be included in the aggregate amount indicated below and therefore will count toward the fulfillment of this LOI.

I agree to the conditions of the LOI as stated in the current Disclosure Booklet, including the minimum purchase requirement and escrow provisions. I intend to contribute, within a 13-month period, beginning on the date of my initial contribution on or following the date of this LOI, an aggregate amount which, together with my initial purchase, will be at least equal to:

<input type="checkbox"/> \$50,000	<input type="checkbox"/> \$100,000	<input type="checkbox"/> \$250,000	<input type="checkbox"/> \$500,000	<input type="checkbox"/> \$1,000,000*
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\*Requires purchases of Units for multiple Accounts on behalf of multiple Designated Beneficiaries due to Maximum Contribution Limit

**10 Signature and Authorization** *(This section must be signed for these changes to take effect.)*

By signing below as the Financial Advisor for the account referenced in Section 1 of this form, it is my intention to change the information indicated on this form and any accompanying LOI on this Account as indicated on this *Account Information Change Form*. If the address has changed if there has been a change to the banking information on file, I understand that a withdrawal cannot be processed for 30 days, unless a medallion signature guarantee appears below.

If the Account Owner has designated a Successor Owner, then I understand this form, rather than a will or codicil, should be used to change or revoke the Successor Owner designation. In addition, I understand that ownership of this Account cannot be transferred to the designated Successor Owner

unless that individual is eligible to be an Account Owner as described in the *Disclosure Booklet*, and upon submission of an acceptable proof of death and a new *Account Application*. The Account Owner or I will notify the Successor Owner of his/her status.

I authorize the *Michigan 529 Advisor Plan* to debit the bank account referenced on this Form and to deposit such funds into this Account as requested on this form. If contributions through the Automatic Contribution Plan or by Electronic Funds Transfer are authorized on 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 *Michigan 529 Advisor 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.

For all changes of Account ownership, the signature of the Account Owner, Custodian, or Authorized Representative of an Individual or Entity Account Owner appears below.

Signature of Financial Advisor or Account Owner, Custodian or Authorized Representative of an Individual or Entity Account Owner	Date
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Required for change of Account Ownership only

Signature of Account Owner, Custodian or Authorized Representative of an Individual or Entity Account Owner	Date
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By checking this box, I authorize the Financial Advisor named in Section 11 of this form to conduct transactions via telephone on my behalf.

**IMPORTANT INFORMATION**

A Signature Validation Program Stamp or Medallion Signature Guarantee Stamp is required for legal name changes, if you plan to redeem funds from your Account within thirty days of an address change or change of banking information, or if you plan to redeem funds from your Account within thirty days of a change of ownership.

**AFFIX SVP STAMP HERE**

**11 Dealer Information**

<i>Financial Advisor's Name</i>	<i>Rep ID Number</i>
<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

*Financial Advisor Branch Office Address*



<i>Financial Advisor Branch Office Address City</i>	<i>State</i>	<i>Zip Code</i>
<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

<i>Branch Number</i>	<i>Telephone Number</i>
<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

<i>Dealer Name</i>	<i>Telephone Number</i>
<table border="1" style="width: 100%; height: 20px;"></table>	<table border="1" style="width: 100%; height: 20px;"></table>

**Mail Form to:**

*Via regular mail:*

MI 529 Advisor Plan  
 PO Box 55070  
 Boston, MA 02205-5070

Via overnight courier:

MI 529 Advisor Plan  
 c/o Boston Financial  
 30 Dan Road  
 Canton, MA 02021-2809