

781—16.4(12D) Forms.

16.4(1) Appropriate forms must be completed on paper, online or via telephone (whichever is applicable for the requested actions) to perform the actions listed below. Current forms are available online at ISave529.com for ISave 529 and at www.iowaadvisor529.com for the IAdvisor 529 plan. Actions that require the completion of an appropriate form include the following:

- a.* Participation.
 - (1) Open or close an account.
 - (2) Reserved.
- b.* Account changes.
 - (1) Update the account owner or beneficiary contact information.
 - (2) Change the beneficiary.
 - (3) Add, change or remove a successor or interested party.
 - (4) Transfer ownership rights of an account to another person.
- c.* Investment changes.
 - (1) Exchange existing investments.
 - (2) Change the direction of future contributions.
- d.* Contribution changes.
 - (1) Establish, delete or change automatic investments or payroll deduction.
 - (2) Establish, delete or change banking information.
 - (3) Establish or make an electronic bank transfer or an additional purchase by check.
 - (4) Transfer funds from a qualified U.S. savings bond, education savings account or another 529 plan (directly or indirectly).
- e.* Withdrawals.
 - (1) Request a full or partial withdrawal.
 - (2) Request a qualified rollover.
- f.* Authorization.
 - (1) Establish, delete or change an authorized agent, limited power of attorney or power of attorney on an account.
 - (2) Authorize or change a financial advisor or agent who can obtain information regarding the account.
 - (3) Identify the current trustee of a trust.
 - (4) Identify officers of an organization who can act upon an account.

16.4(2) The contractor may from time to time provide additional forms for use by account owners and beneficiaries in connection with actions involving a plan and will make those forms available online and in paper format and may authorize substitute forms for a plan or a process in lieu of existing forms.

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