

**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](http://ISave529.com) for ISave 529 and at [www.iowaadvisor529.com](http://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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