

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 www.collegesavingsiowa.com for college savings Iowa and at www.iowaadvisor529.com for the Iowa advisor 529 plan. Actions which require the completion of an appropriate form include the following:

- a.* Open or close an account.
- b.* Transfer ownership rights of an account to another person.
- c.* Change a beneficiary.
- d.* Exchange existing investments.
- e.* Change the direction of future contributions.
- f.* Establish, delete or change automatic investments.
- g.* Make an additional purchase by check.
- h.* Request a full or partial withdrawal.
- i.* Add, change or delete payroll deduction.
- j.* Establish or make an electronic bank transfer.
- k.* Establish, delete or change interested party information.
- l.* Establish, delete or change a successor participant.
- m.* Change the participant's e-mail or mailing address or telephone number.
- n.* Request a rollover to another 529 plan.
- o.* Transfer funds from a qualified U.S. savings bond.
- p.* Roll over assets directly or indirectly from another 529 plan.
- q.* Establish, delete or change the power of attorney on an account.
- r.* Authorize limited power of attorney for the account.
- s.* Authorize or change a financial advisor who can obtain information regarding the account.
- t.* Identify the current trustee of a trust.
- u.* Identify officers of an organization.
- v.* Update beneficiary information on the account.

16.4(2) The program administrator may from time to time provide additional forms for use by participants 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, except when not permitted by Iowa Code chapter 12D.