

# EdVest<sup>SM</sup> Investment Change



Complete this form to request an investment change for your *EdVest* account. Investment changes are permitted once per calendar year and upon a change in designated beneficiary. If you have questions or would like help completing this form, call us toll-free at 1-888-338-3789. Information is also available online at [EdVest.com](http://EdVest.com).

## 1 ACCOUNT INFORMATION AND MAILING ADDRESS (PLEASE PRINT)

**A Social Security/ taxpayer ID number is required for any change to be processed.**

Fund and account number _____			
Name of account owner, custodian (first, middle initial, last), or entity _____		Social Security/taxpayer ID number _____	
U.S. residential street address _____	City _____	State _____	ZIP code _____
U.S. mailing address (if different than U.S. residential street address) _____	City _____	State _____	ZIP code _____
Email address _____	Daytime phone _____	Evening phone _____	
Name of designated beneficiary (first, middle initial, last) _____	Social Security number _____	Date of birth (mm/dd/yyyy) _____	

*Note: If the address above is different than the address currently listed on our records, we will update all accounts for the account owner, custodian, or entity. All future correspondence will be sent to the new address until you advise us otherwise. Distributions to a new address will require your signature to be Medallion Guaranteed if requested within 15 days of the address change.*

## 2 NEW INVESTMENT SELECTION

By indicating an investment option below, you are requesting to change the current investment selection for the account(s) listed in section 1 of this form. This is considered an investment change for all accounts with the same owner and beneficiary as described in the Program Description and Participation Agreement. **If you are moving out of the Tuition Unit Option, you must also submit a completed *EdVest* Account Application.**

*Note: If no amount is indicated or the balance in the current account is less than the amount requested, the entire balance will be transferred to the new account.*

Move to an existing *EdVest* account for the beneficiary: \_\_\_\_\_ \$ \_\_\_\_\_  
Fund and account number

Complete the following to move to a new *EdVest* account for the beneficiary. Refer to the Program Description and Participation Agreement for details on the investment options. A separate account will be established for each portfolio you select.

- Fixed allocation options**
- Vanguard Small Cap Index Portfolio \$ \_\_\_\_\_
  - Vanguard International Index Portfolio \$ \_\_\_\_\_
  - Vanguard Stock Index Portfolio \$ \_\_\_\_\_
  - Wells Fargo Aggressive Portfolio \$ \_\_\_\_\_
  - Wells Fargo Moderate Portfolio \$ \_\_\_\_\_
  - Vanguard Balanced Portfolio \$ \_\_\_\_\_
  - Wells Fargo Balanced Portfolio \$ \_\_\_\_\_
  - Wells Fargo Conservative Portfolio \$ \_\_\_\_\_
  - Vanguard Bond Index Portfolio \$ \_\_\_\_\_
  - Wells Fargo Bond Portfolio \$ \_\_\_\_\_
  - Wells Fargo Money Market Portfolio \$ \_\_\_\_\_
  - Bank CD Portfolio\* \$ \_\_\_\_\_

- Enrollment-based options**  
 Investment mix changes over time, based on the estimated years to enrollment of the designated beneficiary.
- Anticipated year of college enrollment: 20 \_\_\_\_\_
- Note: If no year is entered, we will add 18 years to the designated beneficiary's date of birth if the birth month is January through August and 19 years if the birth month is September through December.*
- Aggressive Growth Track \$ \_\_\_\_\_
  - Moderate Growth Track \$ \_\_\_\_\_
  - Conservative Growth Track \$ \_\_\_\_\_

\* The Bank CD Portfolio is only available in the Investor Class (no-load) shares.

**3 ANTICIPATED YEAR OF ENROLLMENT (COMPLETE TO CHANGE)**

If a new anticipated year of enrollment is provided, the account(s) listed in section 1 of this form will be updated.

A change to the anticipated year of enrollment for an enrollment-based account is considered an investment change for all accounts with the same owner and beneficiary as described in the Program Description and Participation Agreement. The portfolio may change and a new account number may be assigned. A change to the anticipated year of enrollment for a fixed allocation account is not considered an investment change.

Provide the anticipated year the designated beneficiary will begin college: 20\_\_\_\_\_

**4 IMPORTANT INFORMATION ABOUT ACCOUNT OPTIONS**

Please review the following information regarding the account options on your current and any new account(s) opened as a result of this investment change.

**Future automatic investment plan (AIP) contributions** (\$15 minimum investment, per account)

*Note: If an AIP is started on any new account(s), the current information on file will be used unless indicated below.*

**If you are moving the entire current account balance**—Any active AIP will be stopped on your current account. If you open one new account, the AIP will be automatically established on your new account and any AIP in process will be purchased into the new account. If you open multiple new accounts, an AIP will not be established on the new accounts unless instructed below.

Start an AIP for \$\_\_\_\_\_ on the \_\_\_\_\_ day of each month on all new accounts. Only bank information on file will be used.\*\*

**If you are moving a portion of the current account balance**—Any active AIP will remain on the current account and an AIP will not be established on the new account(s) unless instructed below.

Start an AIP for \$\_\_\_\_\_ on the \_\_\_\_\_ day of each month on all new accounts. Only bank information on file will be used.\*\*

Stop the AIP on the current account or  Modify the AIP on the current account to \$\_\_\_\_\_ on the \_\_\_\_\_ day of each month.

**Express purchase**—If you have the express purchase option as a contribution method on your current account, it will be established on your new account(s) unless you indicate otherwise.\*\*

**Redemption**—If you have the redemption option on your current account, it will be established on your new account(s) unless you indicate otherwise.\*\*

**Future payroll direct deposits**—If you are a participant in your employer's payroll direct deposit program, you must inform your employer of your new account number(s). Contributions received via payroll direct deposit into your current account may be returned if the entire balance is moved to a new account.

I would like to contribute to my account via payroll direct deposit. Please send me information that I may forward to my employer, which includes my new account number(s). *Confirm that your employer offers payroll direct deposit before selecting this option.*

\*\* Complete an EdVest Account Change Request form to update bank information or to establish an AIP, the express purchase option, or the redemption option.

**5 ACCOUNT AGREEMENT AND SIGNATURE(S)**

I certify that the information I have provided on this form—and all future information I will provide with respect to my EdVest account—is true, complete, and correct. By submitting this investment change request, I represent that I have not exceeded my investment change limit this calendar year. I have received and agree to the terms set forth in the Program Description and Participation Agreement and on this form. I understand that any individuals authorized to act on my original account will be assigned to and have authority in the same capacity on my new account.

To initiate any change, you must sign and date here.

X \_\_\_\_\_  
Signature of account owner, custodian, trustee, partner, officer, or authorized financial advisor      Print name (and title, if applicable)      Date

X \_\_\_\_\_  
Signature of co-trustee, partner, or officer      Print name (and title, if applicable)      Date

Before you mail, have you:  Completed section 1?  Completed sections 3 and 4 (if applicable)?  
 Selected an investment option in section 2?  Signed this form in section 5?

MAIL TO: EdVest | c/o Wells Fargo | P.O. Box 55244 | Boston, MA 02205-8348

EdVest is a state-sponsored 529 college savings plan administered by the State of Wisconsin. Wells Fargo Funds Management, LLC, a wholly owned subsidiary of Wells Fargo & Company, provides investment management and administrative services for the EdVest plan. Shares in the program are distributed by Wells Fargo Funds Distributor, LLC, Member FINRA/SIPC, an affiliate of Wells Fargo & Company. 203268 07-11

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