

781—16.4(12D) Forms.

16.4(1) Appropriate forms must be completed in paper, online or via telephone (whichever is applicable for the requested actions) to perform the actions listed. 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.* Terminate a participation agreement.
- b.* Transfer ownership rights of an Iowa 529 plan account to another person pursuant to Iowa Code section 12D.6(5).
- c.* Request the substitution of a beneficiary.
- d.* Exchange investments.
- e.* Establish, delete or change automatic investments.
- f.* Establish, delete or change banking information.
- g.* Request a qualified withdrawal.
- h.* Request an allocation update.
- i.* Request for payroll deduction.
- j.* Establish, delete or change electronic bank transfer information.
- k.* Establish, delete or change interested party information.
- l.* Establish, delete or change successor information.
- m.* Change E-mail address on file.
- n.* Change address on file.
- o.* Request a rollover to another 529 plan.
- p.* Establish, delete or change power of attorney on an account.
- q.* Change beneficiary information on an 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 the Iowa 529 plan and will make those forms available online and in paper format.