

College SAVE Plan Automatic Investment Plan/ Electronic Bank Transfer Form

College SAVE™

Bank of North Dakota's 529 Plan

- Print clearly, preferably in capital letters and black ink.
- Complete this form to start, change, or stop an automatic investment from your bank account, or to add or change bank account information for contributions by electronic transfer from a bank. Complete and submit a separate form for each account you own in College SAVE.
- You can start, change, or stop automatic investments and electronic bank transfers by accessing your account online at www.collegesave4u.com.

Forms can be downloaded from our website at www.collegesave4u.com, or you can call us to order any form – or request assistance in completing this form at **1.866.SAVE.529 (866.728.3529)** any business day from 8 a.m. to 8 p.m. ET.

Return this form to:

College SAVE
P.O. Box 219781
Kansas City, MO 64121-9781

College SAVE
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

For overnight delivery or registered mail, send to:

1 Account Information

Account Number

Name of Participant (first, middle initial, last)

Daytime Telephone Number

Evening Telephone Number

Name of Designated Beneficiary (first, middle initial, last)



* N D A I P E B T *

2 Options

A. Automatic Investment Plan (AIP). You can transfer money from your bank account to your College SAVE account on a set schedule.

- Options for adding, changing, or stopping the AIP option.

Amount of Debit: \$ [] [] [] [] [] [] 0 0

Frequency: (Check one.) [] Monthly (\$25 minimum) [] Quarterly (\$75 minimum)

Start Date: [] [] [] - [] [] [] - [] [] [] []
Date (month, day, year)

Your bank account will be debited on this date and your investment will be credited to your College SAVE account on the previous business day.

B. Electronic Bank Transfer (EBT). Add bank information for future electronic bank transfers. We will keep your bank instructions on file for future EBT contributions.

- Options for adding, changing, or deleting EBT information.

3 Bank Information

- Instructions for completing the bank information section.

Form fields for Bank Name, Bank Telephone Number, Bank Routing Number, Bank Account Number, and Account Type.

Note: The routing number is usually located in the bottom left corner of your checks. You can also ask your bank for the routing number.

4 Signature – YOU MUST SIGN BELOW

I certify that the information provided herein is true and complete in all respects. I understand that all changes made on this form supersede all my previous designations.

Signature line and Date field.