



# TNStars College Savings 529 Program Account Features Form

- Use this form to add, change, or delete Recurring Contributions, Electronic Funds Transfer (EFT), Systematic Reallocation, and banking information on your TNStars College Savings 529 Program Account.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.

Forms can be downloaded from our website at [www.tnstars.com](http://www.tnstars.com), or you can call us to order any form — or request assistance in completing this form — at **855.386.7827**, Monday–Friday 8 a.m. to 4:30 p.m. Central time.

**855.386.7827**  
8:00 a.m. to 4:30 p.m. Central Time M-F

[\*\*www.tnstars.com\*\*](http://www.tnstars.com)

[\*\*TN.STARS@tn.gov\*\*](mailto:TN.STARS@tn.gov)

Regular mailing address:  
**TNStars College Savings 529 Program**  
**P.O. Box 55597**  
**Boston, MA 02205-5597**

Overnight mailing address:  
**TNStars College Savings 529 Program**  
**95 Wells Ave, Suite 155**  
**Newton, MA 02459-3204**

## 1. Current Participant information

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	—	<input type="text"/>	<input type="text"/>
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Account Number(s) (To list more than 3 Accounts, use a separate sheet.)

Name of Participant (first, middle initial, last)

—  —

Telephone Number (In case we have a question about your Account.)

## 2. Features to add, update, or delete (Check all that apply.)

- Recurring Contribution Program/Electronic Fund Transfer— **Section 3**
- Bank information— **Section 4**
- Systematic Reallocation— **Section 5**



### 3. Recurring Contribution/Electronic Fund Transfer (EFT)

- Complete this section to add, change, or delete a recurring contribution from your bank account, or to add a one-time contribution by electronic transfer from a bank.
- You can add, change, or delete a Recurring Contribution or make a one-time EFT by accessing your Account online at [www.tnstars.com](http://www.tnstars.com).
- To add Recurring Contributions instructions or multiple bank accounts, complete and include **Section 3** and **Section 4** for each instruction.
- Recurring Contribution or EFT will be unavailable for withdrawal for 21 calendar days.
- When adding or changing bank information on your account, a 10 calendar day hold will be placed.
- Your transfer will be allocated according to the standing allocation(s) on your Account.
- Minimum initial investment amount is \$25 per Investment Option selected.

A.  **Recurring Contributions.** You can transfer money from your bank account to the TNStars College Savings 529 Program Account on a set schedule or custom schedule. *(Check all that apply.)*

- Add this option to my Account. *(Provide the information below and in Section 4.)*
- Change my investment amount, frequency, and/or debit date to my existing Recurring Contribution *(Provide the new amount and/or debit date below.) Note: If you wish to skip a scheduled Recurring Contribution, please call 855.386.7827.*
- Change the bank account information currently being used for my existing Recurring Contribution. *(Provide the information in Section 4.)*
- Delete this option.

**Amount of Debit:**  \$25  \$50  \$100  \$150  \$250  Other \$   ,    .   0  0  
Amount

**Frequency (Check One):**  Monthly  Quarterly  
(Every three months.)  Custom

**Custom Only:**  January  February  March  April  
*(Select months you would like your Recurring Contributions to occur)*  May  June  July  August  
 September  October  November  December

**Start Date:\***    —    —       
Date (mm/dd/yyyy)

\* TNStars College Savings 529 Program must receive instructions at least three business days prior to the indicated start date; otherwise, debits from your bank account will begin the following month on the day specified. Please review your quarterly statements for details of these transactions. If the date is not specified, this option will begin the month following the receipt of this request, on the 10th day of the month.



**5. Systematic Reallocation Program** *(Optional)*

Systematic Reallocation allows you to reallocate from one Investment Option to one or more Investment Options within your Account on a pre-scheduled basis.

- To participate in Systematic Reallocation, you must contribute at least \$5,000 or have a balance of at least \$5,000 in the Source Investment Option to one or more Target Investment Options on a pre-scheduled basis. The reallocation from the Source Investment Option must have a minimum of \$5,000 in assets to start the Systematic Reallocation.
- You must designate a minimum of \$500 for each monthly or quarterly scheduled exchange.
- Creating a Systematic Reallocation using money that is already invested in your account will count towards your twice per calendar year Investment Option change limit.
- Creating a Systematic Reallocation with new money contributed to your account will NOT count towards your twice per calendar year Investment Option change limit. To start a Systematic Reallocation using new money you must mail a contribution check with this completed form to the TNStars College Savings 529 Program.
- If you make any changes to or cancel an established Systematic Reallocation it will count towards your twice per calendar year Investment Option change limit.
- You cannot select Age-Based Option(s) as a "Source Investment Option."

**Frequency** *(Check one):*     Monthly                       Quarterly *(3 months from the start date)*

**Amount:**                      \$     ,     .    
Amount

**Start Date:\***                        -   -      
Date *(mm/dd/yyyy)*

\*The Program must receive instructions at least three business days prior to the indicated start date. Please review your quarterly statements for details of these transactions. If the date is not specified, this option will begin the month following the receipt of this request, on the 10th day of the month.

**Source Investment Option**

**Target Investment Option(s)**

\$     ,     .

Investment Option

Amount *(minimum \$500)*

\$     ,     .

Investment Option

Amount *(minimum \$500)*

\$     ,     .

Investment Option

Amount *(minimum \$500)*

**Stop Type** *(Select one):*

**Stop Date:**                        -   -      
Date *(mm/dd/yyyy)*

**When total amount of reallocation equals:** \$     ,     .      
*(minimum \$5,000)*

**When Complete Balance of the "Source Investment Option" is depleted.**

*By completing this section and signing this form, I authorize the TNStars College Savings 529 Program to process the periodic reallocation as indicated. I understand that making changes to an established Systematic Reallocation Program will count towards my twice per calendar year Investment Option change limit.*

**6. Signature — YOU MUST SIGN BELOW**

- I certify that I have read and understand, consent, and agree to all the terms and conditions of the TNStars College Savings 529 Program Disclosure Brochure as they relate to adding, deleting, or changing financial features.
- By signing below, I authorize the TNStars College Savings 529 Program or its designee to add, delete, or change financial features according to the instructions above.
- If I have added or changed banking information in **Section 4**, I certify that I have authority to transact on the bank account so indicated.
- If the Account is owned by an entity or trust, I certify that I am authorized to act on its behalf in making this request. If the Account is funded with UGMA/UTMA assets, I further certify that I am the Parent/Guardian/Custodian of the Account identified in **Section 1**.
- 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.
- If I have chosen the Recurring Contributions or EFT option, I authorize the TNStars College Savings 529 Program, the State of Tennessee, Ascensus College Savings Recordkeeping Services, LLC and its affiliates, and their respective agents, employees and affiliates, (collectively, "the TNStars College Savings 529 Program Associated Persons") and its designees, upon telephone or online request, to pay amounts representing redemptions made by me or to secure payment of amounts invested by me, by initiating credit or debit entries to my Account at the bank named in **Section 4**. I authorize the bank to accept any such credits or debits to my Account without responsibility to their correctness. I acknowledge that the origination of ACH transactions involving my bank account must comply with U.S. law. I further agree that the TNStars College Savings 529 Program Associated Persons, will not incur any loss, liability, cost, or expense for acting upon my telephone or online request. I understand that this authorization may be terminated by me at any time by notifying the TNStars College Savings 529 Program and the bank by telephone or in writing, and that the termination request will be effective as soon as the TNStars College Savings 529 Program and the bank have had a reasonable amount of time to act upon it. I certify that I have authority to transact on the bank account identified by me in **Section 4**.

SIGNATURE \_\_\_\_\_  
 Signature of Participant

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 Date (mm/dd/yyyy)

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