

College Savings Plans Transfer of Ownership

Complete this form and an Account Application signed by the new Account Owner to transfer ownership of your College Savings Plan account(s) to a new Account Owner. A new account number will be assigned to each account listed below. If you have questions or would like help completing this form, call **1-800-222-8222**. If you are a financial advisor and have questions, call **1-888-877-9275**.

1 CURRENT ACCOUNT OWNER (PLEASE PRINT)

Current Account Owner's or Custodian's name (first, middle initial, last) or entity's name

Social Security or taxpayer identification number

2 ACCOUNT(S) TO BE TRANSFERRED

List ALL of the accounts you would like to have transferred to the new Account Owner indicated in section 3.

Fund and account number

Fund and account number

Fund and account number

Fund and account number

3 TRANSFER INSTRUCTIONS

This form must be accompanied by an Account Application, completed and signed by the new Account Owner.

Transfer amount: Full balance Partial balance amount \$ _____

Note: If no box is checked, or the balance in the current account is less than the amount requested, or the amount requested to remain in the current account is less than the minimum balance required and the current account does not have an active Automatic Investment Plan or payroll direct deposit, the entire balance will be transferred.

Transfer ownership to: Indicate below the individual or entity to whom you wish to transfer ownership of the accounts listed in section 2 and submit a completed Account Application. Note that the new Account Owner must be an eligible Account Owner.

New Account Owner's or Custodian's name (first, middle initial, last) or entity's name

If Trust, name of Trustee(s) (first, middle initial, last)

4 SIGNATURE(S)

I understand that by transferring ownership to the individual or entity indicated in section 3, I am relinquishing all future ownership rights to the account(s).

X

Signature of **current** Owner, Custodian, Trustee, Partner, or Officer

Print name of **current** Owner, Custodian, Trustee, Partner, or Officer

Date

X

Signature of **current** Co-Trustee, Partner, or Officer (if applicable)

Print name of **current** Co-Trustee, Partner, or Officer (if applicable)

Date

HAVE YOUR SIGNATURE(S) MEDALLION GUARANTEED. If all signatures are not Medallion Guaranteed, this document will be returned to you.

Affix Medallion stamp here.

X

Medallion Guarantee*

Date

***A Medallion Guarantee is required of all current Account Owners or authorized individuals to complete this transfer of ownership request. A Medallion Guarantee may be obtained from any eligible guarantor institution, as defined by the Securities and Exchange Commission. These institutions include banks, savings associations, credit unions, and brokerage firms. The words "MEDALLION GUARANTEED" must be stamped or typed near your signature being guaranteed. The guarantee must appear with the printed name, title, and signature of an officer and the name of the guarantor institution. Note that a Notary Public stamp or seal is NOT acceptable.**

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CSPAOT04-05

NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE