

Iowa Advisor 529 Plan Advisor of Record Transfer Form

Complete this form to change the advisor-of-record to another financial advisor on your Iowa Advisor 529 plan account. If you have questions about this form, contact your financial advisor or call **1-800-774-5127**. Information is also available online at www.iowaadvisor529.com.



1 ACCOUNT REGISTRATION

Name of Account Owner, Custodian, or Trustee/Executor

2 ACCOUNT INFORMATION

To help ensure timely and accurate processing of this form, please print clearly.

Option and account number

Option and account number

Option and account number

Option and account number

Option and account number

Option and account number

3 CURRENT DEALER/ADVISOR INFORMATION

Current Firm

Current Registered Representative's Name

4 NEW DEALER/ADVISOR INFORMATION

New Firm

Account Number with New Firm (optional)

U.S. street address

City

State

Zip code

Branch number

Network Level

Registered Representative's Name

ID Number

Phone Number

5 SIGNATURE

x _____
Signature of Account Owner, Custodian, or Trustee/Executor

Print name

Date

6 MAILING INSTRUCTIONS

REGULAR MAIL

Iowa Advisor 529 Plan
c/o Voya Investment Management
PO Box 9659
Providence, RI 02940-9659

OVERNIGHT/COURIER

Iowa Advisor 529 Plan
c/o Voya Investment Management
4400 Computer Drive
Westborough, MA 01581-1722

Iowa Advisor 529 Plan is a part of the Iowa Educational Savings Plan Trust, a state-sponsored 529 college savings plan administered by the State of Iowa, for which the Treasurer of the State of Iowa serves as the Trustee. Voya Investment Management Co. LLC provides investment management and administrative services for the Iowa Advisor 529 Plan. Shares in the Program are distributed by Voya Investments Distributor, LLC, Member FINRA/SIPC.

