1. Current Account Information

Account Number: ________________________________

Account Owner Legal Name (First, M.I., Last): ________________________________

Daytime Phone Number: __________________________ Evening Phone Number: ________________________________

Name of Beneficiary: ________________________________

2. Action to Be Taken (Check One)

☐ Start a New Automatic Investment Plan (Complete Sections 3, 5 and 6)
☐ Modify an Existing Automatic Investment Plan (Complete Sections 3 and 6)
☐ Add or Change Banking Information on file for contributions and redemptions (Complete Sections 5 and 6)
☐ One-time Electronic Bank Transfer (Complete Sections 4, 5 and 6)
☐ Discontinue my Automatic Investment Plan (Complete Section 6)

3. Amount and Frequency of Transactions

Complete this Section if you checked Start a New Automatic Investment Plan or Modify an Existing Automatic Investment Plan in Section 2 above.

Automatic Investment Plan Amount $ ________________________________

Frequency of Transactions (Check one):

☐ Monthly (Date) ______
   (If you do not provide a date, the transfer will occur on the 18th of each month.)

☐ Twice a Month (Dates) _____ & _____
   (If you do not provide dates, the transfers will occur on the 10th and the 24th of each month.)

☐ Quarterly (Day of Month): ________
   ☐ January, April, July, October   ☐ February, May, August, November   ☐ March, June, September, December

☐ Annually (MM/DD) ________________________________
4. **One-Time Electronic Bank Transfer**

   Amount to be Transferred from your Bank Account $ ____________________

   - [ ] Invest pursuant to my current investment allocation on file
   - [ ] Invest this one-time amount per the following direction (for this contribution only):

<table>
<thead>
<tr>
<th>529 Portfolio</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

5. **Banking Information**

   Fill out the following to add or update bank instructions to your Bright Start Account for an Automatic Investment Plan,Electronic Bank Transfer, subsequent contributions, or redemptions.

   - [ ] Add bank information
   - [ ] Add bank information—bank account owner is not the same as Account Owner (Medallion Signature REQUIRED in section 6).
   - [ ] Replace current bank information

1. **Account Type:**
   - [ ] Checking
   - [ ] Savings

   Name of Bank Account:___________________________________________________________

   If the bank account is a joint account, please list the 529 account owner.

   - Tape Voided check here. Do not Staple.

   This bank account will automatically be linked to your Bright Start College Savings Program Account for telephone and website purchase and redemption/withdrawal transactions.

   **Your Name**

   **Pay to the order of**

   **Date**

   **$**

   **Sample**

   **Bank Name and Address**

   **Memo**

   :123456789: 34568:
Authorization

By signing below, I certify that the information contained herein is true, complete, and correct.

By selecting the electronic transfer service in Sections 2, 3, 4, and/or 5, I (the contributor) hereby authorize Union Bank & Trust Company to initiate debit and/or credit entries to the bank account indicated above, and the bank indicated above to debit the same amount. As the Bright Start College Savings Program Account Owner, I acknowledge that the referenced bank account will be linked to my Bright Start College Savings Program Account so that I may purchase or sell shares by telephone or online at BrightStartSavings.com. This authority is to remain in full force and effect until Union Bank & Trust Company has received notification from me of its modification or termination in such time as to afford Union Bank & Trust Company reasonable time to act on it. I understand that if a transaction cannot be made because of insufficient funds or because either account has been closed, this service will be cancelled by Union Bank & Trust Company. I acknowledge that the origination of Automated Clearing House ("ACH") transactions to my account must comply with the provisions of applicable law. I further agree that if my draft is dishonored for any reason, with or without cause, Union Bank & Trust Company will not bear any liability. Union Bank & Trust Company may correct any transaction errors with a debit or credit to my financial institution account and/or the Bright Start College Savings Program Account. Please retain a copy of this authorization for your records.

I authorize Union Bank & Trust Company, its agents and affiliates, and the Trust to act on any instructions believed to be genuine and from me for any telephone, electronic and website services. Union Bank & Trust Company and the Trust use procedures designed to verify the authenticity of the Account Owner or Custodian. If these procedures are followed, Union Bank & Trust Company and the Trust will not be liable for any loss that may result from acting on unauthorized instructions. I understand that anyone who can properly identify my Account(s) can obtain information about my Account and can make telephone, electronic, or computer exchange and/or redemption, contribution or withdrawal transactions on my behalf.

**Signature and Date Required**

<table>
<thead>
<tr>
<th>X</th>
<th>Signature of Account Owner, Custodian (UGMA/UTMA Accounts), or Trustee</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Name Here</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title (if other than an individual)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Bank Account Owner's Signature** (if the contributor is different than the Bright Start Account Owner).

**MEDALLION SIGNATURE GUARANTEE REQUIRED**

I acknowledge that my above-referenced bank account will be linked to the Bright Start College Savings Program Account referenced in Section 1.

<table>
<thead>
<tr>
<th>X</th>
<th>Bank Account Owner's Signature (if the contributor is different than the Bright Start Account Owner).</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Name Here</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Medallion Signature Guarantee**

A Medallion Signature Guarantee is required if the name on the bank account is not the same as the Bright Start College Savings Program Account Owner.

**MEDALLION SIGNATURE GUARANTEE**

Signature must be stamped with a Medallion Signature Guarantee by a qualified financial institution, such as a commercial bank, savings and loan, U.S. stock broker and security dealer, or credit union, that is participating in an approved Medallion Signature Guarantee program.

(A NOTARY PUBLIC CANNOT PROVIDE A SIGNATURE GUARANTEE)