

# Maryland College Investment Plan Account Services



**COLLEGE SAVINGS**  
**PLANS OF MARYLAND**

*Maryland College Investment Plan*

**✓ Use this form to:**

- Change your address. Address changes may be requested by phone.
- Add or change bank information.
- Add or change Automatic Monthly Contributions (AMC).
- Request contributions through payroll deduction.
- Send copies of statements to a third party.

This paper clip indicates you may need to attach documentation.

**Mail to:**

Maryland College  
Investment Plan  
P.O. Box 17479  
Baltimore, MD 21297-1479

**Express delivery only:**

Maryland College  
Investment Plan  
Mail Code: 17479  
4515 Painters Mill Road  
Owings Mills, MD 21117-4903

This stamp indicates a signature guarantee is required.

## 1 Account Information

Account Holder (Trust name if applicable)	Social Security/Tax ID Number
Custodian or Trustee (if applicable)	
Beneficiary	Social Security Number

## 2 New Contact Information

Skip this section if no changes are needed. Any change applies to all College Savings Plans of Maryland Accounts with the same Account Holder unless you indicate otherwise.

Residential Address (cannot be a P.O. box)*		
City*	State*	ZIP Code*
Day Phone	Evening Phone	
E-mail Address		
Mailing Address (if different from residential)		
City	State	ZIP Code

**\*NOTE:** Required pursuant to the USA PATRIOT Act.

Send copies of my quarterly statements for all of my Accounts for this Beneficiary to the name and address below:

Name		
Address		
City	State	ZIP Code

## 3 Bank Information

Complete this section to add or change electronic funds transfer (EFT) service. This service allows you to move money between your bank account and your 529 Account(s) quickly and easily. **Allow 15 days for initial setup.** EFTs occur when you initiate them. Only bank accounts of the Account Holder or the Beneficiary may be used for distributions.

**Enclose a voided check(s) or preprinted savings deposit slip(s). We cannot accept starter checks.**

Checking account **or**  Savings account

**Check one:**

- Add bank information.
- Replace current bank information.

**NOTE:** If the Account Holder or Custodian is not an owner of the bank account, a signature guarantee is required.

## 4 Automatic Monthly Contribution (AMC)

Complete this section to enroll in AMC or payroll deduction or to change AMC.

**Check one:**

- New enrollment in AMC (no AMC currently on Account).
- Redirect current AMC to new portfolio below.
- Change current AMC (dates and amount provided below).
- Add another AMC (keep current AMC on Account).
- Payroll deduction. Verify that your employer participates in payroll deductions. We will mail instructions to you for your employer. For permanent Maryland State employees, complete the [Maryland State Payroll Deduction](#) form.
- Stop AMC on all portfolios. (To stop payroll deduction, contact your employer.)

Portfolio Name	Amount*	Day(s)**
	\$	
	\$	

To select more investment portfolios, check this box and attach a [separate page](#).

**\* NOTE:** This amount should reflect how much to contribute for each date indicated. Must be at least \$25.

**\*\*NOTE:** If blank, defaults to the first business day of the month. Multiple days are permitted. Payroll deduction dates are determined by your employer.

## 5 Signature(s)

5A Account Holder, Custodian, or Trustee

### By signing this form, I hereby certify and acknowledge that:

- I authorize the Trust and T. Rowe Price, their agents, and their affiliates to act on instructions in this form believed to be genuine and from me.
- T. Rowe Price uses procedures designed to verify the authenticity of the Account Holder or Custodian. If these procedures are followed, the College Savings Plans of Maryland, the Trust, the Trustee, and T. Rowe Price will not be liable for any loss that may result from acting on unauthorized instructions.
- By completing the Bank Information section, I hereby authorize the Trust and T. Rowe Price to initiate debit entries to my account at the financial institution indicated (on the enclosed voided check or savings deposit slip) and for the financial institution to debit the same to such account through the Automated Clearing House (ACH) network, subject to the rules of the financial institution, ACH, and T. Rowe Price. The Trust and T. Rowe Price may correct any transaction error with a debit or credit to my financial institution account and/or College Investment Plan Account. **This authorization, including any credit or debit entries initiated thereunder, is in full force and effect until I notify the College Investment Plan or T. Rowe Price of its revocation by telephone or in writing and the College Investment Plan or T. Rowe Price has had sufficient time to act on it.**
- All services are subject to conditions set forth in the College Investment Plan Disclosure Statement.
- By electing to invest through payroll deduction, I authorize my employer to deduct funds directly from my paycheck and transfer those funds through the ACH network. I understand that my contributions will be allocated in accordance with my instructions in Section 4, but payroll deductions will not begin until I submit additional paperwork from the College Investment Plan to my employer.

### Signature guarantee is required if:

- Adding bank information with a bank account not owned by the Account Holder or Custodian. All owners of the bank account and the Account Holder (or Custodian, if applicable) must sign in the presence of a signature guarantor.

#### SIGNATURE AND DATE REQUIRED

Account Holder or Custodian (if Account Holder is a minor) or Trustee(s) \_\_\_\_\_ Date (mm/dd/yyyy)

X

5B Bank Account Owner

If the Account Holder or Custodian is not an owner of the bank account, the bank account owner must sign here in the presence of a signature guarantor to authorize adding the bank information. EFT services will not be added without the required signature guarantee. 

**NOTE:** Third-party banks can only be used for contributions made with AMC. One-time EFTs are not permitted.

#### SIGNATURE AND DATE REQUIRED

Bank Account Owner \_\_\_\_\_

Date (mm/dd/yyyy)

X

5C Signature Guarantor 

You can obtain the Medallion signature guarantee from most banks, savings institutions or broker-dealers. We cannot accept guarantees from notaries public or non-Medallion guarantors. The level of coverage provided by the guarantor's stamp must cover the dollar amount of the transaction or it may be rejected.

#### MEDALLION SIGNATURE GUARANTEE

Place Medallion Stamp Below:

Name of Institution

Print Name of Person Providing Guarantee

Date (mm/dd/yyyy)