Maryland College Investment Plan

Beneficiary/Portfolio Change

COLLEGE SAVINGS
PLANS OF MARYLAND
Maryland College Investment Plan

✓ Use this form to:

- Change the Beneficiary to a Member of the Family of the current Beneficiary as defined in the College Investment Plan Disclosure Statement.
- Move money or transfer from one portfolio to another portfolio. This may also be requested by phone.

This paper clip indicates you may need to attach documentation.

✗ Do not use this form to:

- Change the Beneficiary to a Beneficiary that is not a Member of the Family of the current Beneficiary as defined in the College Investment Plan Disclosure Statement. Call for instructions.

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

1 Account Information

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

Account Number	Portfolio Name
Portion of this Account to be changed: ☐ Full Account 100% ☐ Partial Account: % **or** $	

☐ For more Accounts, check this box and attach a separate page.

2 New Beneficiary

Skip this section if the Beneficiary is not changing. If the new Beneficiary has an existing Account in the same portfolio, provide the existing Account number.

Name	Citizenship: ☐ U.S. Citizen ☐ U.S. Resident Alien	
Social Security Number	Date of Birth (mm/dd/yyyy)	
Relationship to current Beneficiary*	Existing Account Number	
Address		
City	State	ZIP Code

***NOTE:** The new Beneficiary must be a Member of the Family of the former Beneficiary as defined in the College Investment Plan Disclosure Statement.

☐ For more Beneficiaries, check this box and attach a separate page.

3 Portfolio Change

Skip this section if the portfolio is not changing. To change the portfolio, provide the new portfolio name below. **NOTE:** Unless you are also changing the Beneficiary, the portfolio can only be transferred to another portfolio twice per calendar year for each Beneficiary.

New Portfolio

☐ For more Accounts, check this box and attach a separate page.

If Full Account is checked in Section 1, any existing Automatic Monthly Contributions (AMC) program will be carried over to the new Account. If Partial Account is checked in Section 1, monthly contributions will remain on the current Account unless a different box is checked below.

☐ Transfer AMC/payroll deduction to the new Account.
☐ Stop AMC. (To stop payroll deduction, contact your employer.)

4 Signature

By signing this form, I understand and hereby certify that:

- I authorize the Trust and T. Rowe Price, their agents, and their affiliates to act on any 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.
- The IRS currently allows me to move money or transfer from one portfolio to another twice per calendar year for the same Beneficiary.

SIGNATURE AND DATE REQUIRED

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