

# 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](http://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

## 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 534469  
Pittsburgh, PA 15253-4469

### OVERNIGHT/COURIER

Iowa Advisor 529 Plan  
Attention: 534469  
500 Ross Street 154-0520  
Pittsburgh, PA 15262

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.

