



## 529 Plan Allocation of Periodic ACH Deposits

Use this form to provide instructions for Periodic ACH Deposits to a 529 account. For other deposits, including checks, wires, transfers, and ad hoc ACH deposits, please contact the SSG trading desk to place orders. Only Periodic ACH Deposits will be automatically be invested. If an ACH Link is not already established, please provide the 529 ACH form.

For a quick guide to fund symbols, minimums and share class restrictions, go to [www.capitalgroup.com/fundguide](http://www.capitalgroup.com/fundguide).

Client Name \_\_\_\_\_ Account # \_\_\_\_\_

For Periodic ACH Deposits use these Investment Instructions:

Start Date: \_\_\_\_\_ Frequency: \_\_\_\_\_

Fund Name and Symbol	Percentage	OR	Dollar Amount(\$50 min. per fund)
_____	_____		% OR \$ _____
_____	_____		% OR \$ _____
_____	_____		% OR \$ _____
_____	_____		% OR \$ _____
<b>Total investments</b>	_____		% OR \$ _____

### Important notes:

ACH form is needed to set up periodic deposits.

Purchases will be initiated the following business day after an ACH periodic deposit.

To place orders for deposits other than periodic ACH deposits, please contact the SSG trading desk.

IRS guidelines limit changes in 529 plan investments or strategy to twice per year, including investments into money market fund.

Exchanges from one fund to another or rebalancing funds must be within the same share class.

Rollover checks need the initial investment and earnings breakdown before investing funds.

Refer to the *CollegeAmerica Program Description* for additional information.