

ACCOUNT CHANGE REQUEST

Use this form to make changes to your Custom Monthly Plan. To add a Custom Monthly Plan, create a new account during the annual enrollment period. Changing your Custom Monthly Plan may affect when you can use your GET units. Please call us at 1.800.955.2318 for more information.

Current Account Information

Account Number _____
 Account Owner _____ SSN or TIN _____
 Student Beneficiary _____ SSN or TIN _____

Account Changes- Call us for more information. Some limitations apply.

Convert to Lump Sum*	Change Number of Units	Change Number of Years
<input type="checkbox"/> Convert my Custom Monthly Plan to a Lump Sum Plan	<input type="checkbox"/> Reduce the number of units in my Custom Monthly Plan from _____ units to _____ units (must be in 50 unit increments). (You cannot increase the number of units in your Custom Monthly contract. To add more units, you can buy Lump Sum units or add a new Custom Monthly Plan.)	<input type="checkbox"/> Reduce the number of years in my Custom Monthly Plan from _____ years to _____ years. <input type="checkbox"/> Increase the number of years in my Custom Monthly Plan from _____ years to _____ years.

*Note for converting to Lump Sum-All payments received will be reposted at the unit price in effect at the time that we receive them. Payments made from July 1, 2015 through October 31, 2017 will be posted at \$113 per unit (the unit price in effect on November 1, 2017).

Special Instructions: _____

Automatic Payments

Automatic monthly withdrawals (ACH) can be made from your checking or savings account. To set up a new ACH, you must complete an Automatic Withdrawal Authorization form, available for download from wastate529.wa.gov/forms-get or submit under Payment Options in your online account.

- Inactivate the ACH** for this GET account.
- Change the ACH amount** for this GET account to \$_____.

To change payroll deductions, the employee must submit an Authorization for Payroll Deduction form to his/her payroll department. The form is available for download from wastate529.wa.gov/forms-get.

Account Owner's Signature - Required

Only the Account Owner may authorize changes to this account.

By signing this form, I hereby certify and acknowledge that the information in this form is true, complete and accurate. I authorize GET, its agents and its affiliates to act on instructions in this form believed to be genuine and from me. I authorize these requested changes to my account.

 Account Owner's Signature _____
 Date