

TD Ameritrade 529 College Savings Plan Trusted Contact Person Designation Form

- By completing this form, you designate the person identified below as your Trusted Contact Person, and authorize the TD Ameritrade 529 College Savings Plan and its present and future direct and indirect affiliates, successors and assigns the TD Ameritrade 529 College Savings Plan to contact your Trusted Contact Person and disclose information about your Plan Account:
 - to address possible financial exploitation;
 - to confirm the specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee, or holder of a power of attorney; or
 - as otherwise permitted by Financial Industry Regulatory Authority (FINRA) Rules 2165 and 4512.
- **This form does not create or give your Trusted Contact Person a power of attorney. Your Trusted Contact Person will not be able to access your Account or transfer assets to or from your Account.**
- Completion of this form is optional. A Trusted Contact Person must be at least eighteen (18) years of age. You may add, change or remove your Trusted Contact Person online or by using this form.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.

Forms can be downloaded from our website at www.tdameritrade.com/collegesavings, or you can call us to order any form — or request assistance in completing this form — at **1.877.408.4644** 8 a.m. to 8 p.m. Central time M-F.



1.877.408.4644

8 a.m. to 8 p.m. Central time M-F



www.tdameritrade.com/collegesavings



tdameritrade@NEST529.com

Regular mailing address:

**TD Ameritrade 529 College Savings Plan
P.O. Box 30278
Omaha, NE 68103-1378**

Overnight mailing address:

**TD Ameritrade 529 College Savings Plan
920 Main Street, Suite 900
Kansas City, MO 64105**

1 Current Account Owner Information

Note: If you have not established an account, please complete and enclose an Enrollment Form.

Account Number (First nine digits)

Name of Account Owner (first, middle initial, last)

— —

Telephone Number (In case we have a question about your Account.)

2 Action for Trusted Contact Person

Add Remove Change



* TDA 529 TRUSTED CONTACT *

3 Trusted Contact Person Information

Name of Trusted Contact Person (*first, middle initial, last*)
 — —

Trusted Contact Person's Daytime Telephone Number

 — —

Trusted Contact Person's Mobile Telephone Number

Trusted Contact Person's Email Address

Trusted Contact Person's Mailing Address

City

State

 —

Zip Code

Relationship to Account Owner.

Advisor

Attorney

Family Member

Friend

Spouse

Other

4 Signature — YOU MUST SIGN BELOW**By signing below, I hereby certify that:**

- I authorize the TD Ameritrade 529 College Savings Plan and its service providers to contact the Trusted Contact Person listed in **Section 3** of this form and/or to take any action indicated in **Section 2** of this form. I authorize the Plan and its service providers to disclose information to the Trusted Contact Person about my Plan Account(s) in the following circumstances: to address possible financial exploitation, to confirm the specifics of my current contact information, health status, or the identity of any legal guardian, executor, trustee or holder of a power of attorney, or as otherwise permitted by FINRA Rule 2165 (*Financial Exploitation of Specified Adults*). I certify that the Trusted Contact Person is at least eighteen (18) years of age.

SIGNATURE

Signature of Account Owner

 — —

Date (mm/dd/yyyy)

TD Ameritrade does not provide tax advice. It is suggested that investors seek the advice of your tax-planning professional with regard to your personal circumstances. Nebraska Educational Savings Plan Trust, Issuer. First National Capital Markets, Inc., Distributor, Member FINRA, SIPC. TD Ameritrade, Inc., sub-administrator. First National Capital Markets and First National Bank of Omaha are affiliates. TD Ameritrade, Inc. renders certain marketing and administrative services to the TD Ameritrade 529 College Savings Plan. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and the Toronto-Dominion Bank. All rights reserved. Used with Permission.

