

2. Options (Complete A, B, or both.)

Contributions by automatic investment plan or electronic bank transfer will not be available for withdrawal for ten calendar days.

A. Automatic investment plan (AIP). Have a set amount automatically transferred from your bank account to your PA 529 Investment Plan account on a schedule.

- Add this option to my Account. (Provide your debit information below and your bank information in **Section 3**)
- Change my investment amount, debit date, or both. (Provide the new information below.)
- Change my bank account information. (Provide the new information in **Section 3**)
- Discontinue AIP investments.

Amount of Debit: (\$10 minimum) \$, . **00**

Frequency (Check one.): Monthly Quarterly

Start Date: — —

Date (mm-dd-yyyy)

Your bank account will be debited on the 20th of any month, unless you pick a different date.

Your bank account will be debited (*money will be withdrawn*) on the date you select, and your investment will be credited (*money will be added*) to your PA 529 Investment Plan account on the previous business day.

Note: AIPs with a debit date of January 1st, 2nd, 3rd, or 4th will be credited in the same year as the debit date.

B. Electronic bank transfer (EBT). Allows you to make one time or periodic transfers of \$10 or more from your bank account to your PA 529 Investment Plan account by phone or online. To establish or change this service for your account, provide your bank information in **Section 3**.

- Add Change Delete

4. Signature—YOU MUST SIGN BELOW

I certify that the information provided herein is true and complete in all respects. I understand that all changes made on this form supersede all my previous designations.

If I have added or changed the automatic investment plan or electronic bank transfer option, I authorize the Investment Plan and Ascensus College Savings Recordkeeping Services, LLC, upon telephone or online request, to pay amounts representing redemptions made by me, or to secure payment of amounts invested by me, by initiating credit or debit entries to my account at the bank named in **Section 3**. I authorize the bank to accept any such credits or debits to my account without responsibility for their correctness. I acknowledge that the origination of ACH transactions to my account must comply with provisions of U.S. law. I further agree that the Investment Plan, Ascensus College Savings Recordkeeping Services, LLC, The Vanguard Group, Inc., and their respective affiliates will not incur any loss, liability, cost, or expense for acting upon my telephone or online request. I understand that this authorization may be terminated by me at any time by notifying the Investment Plan, Ascensus College Savings Recordkeeping Services, LLC, and the bank, and that the termination request will be effective as soon as the Investment Plan and Ascensus College Savings Recordkeeping Services, LLC, have had a reasonable amount of time to act upon it. I certify that I have authority to transact on the bank account identified by me.

▶

Signature of Account Owner

— —

Date (mm-dd-yyyy)