

Use this form to convert another 529 share class to 529-A, 529-E or 529-F-2 shares without automated fee debiting.

If you are converting to 529-F-2 shares with automated fee debiting, use the *F-2 Share Conversion and Financial Professional/Fee Authorization* form.

To update the financial professional on file, use the *Financial Professional Change Request or Investment Advisor Representative (IAR) to Act as Agent* form.

## 1 Account information

\_\_\_\_\_  
First name of account owner MI Last

\_\_\_\_\_  
Address City State ZIP

\_\_\_\_\_  
Email address\* Daytime phone ( )

Check here to update the mailing address on your account(s).

**Provide the account number(s) that contain the 529 shares you wish to convert:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*Your privacy is important to us. For information on our privacy policies, visit [www.capitalgroup.com](http://www.capitalgroup.com).

## 2 New share class

*Moves to 529-C shares are not allowed. All existing shares will be moved to the new share class within the same funds.*

### A. New share class

Any existing systematic transactions, such as automatic investments, withdrawals and exchanges, will also move to the new share class within the same funds.

- 529-A<sup>†</sup>
- 529-E
- 529-F-2 without automated fee debiting

<sup>†</sup>Moves to Class 529-A shares may be subject to an up-front sales charge.

### B. Employer-sponsored 529 plan information — if applicable

Complete this section only if you are moving 529 shares to an employer-sponsored 529 plan.

\_\_\_\_\_  
Name of company

\_\_\_\_\_  
EIN (Contact your employer for this information.)

\_\_\_\_\_  
Existing employer-sponsored 529 account number — if applicable

**Note:** If your employer offers payroll deduction and you would like to defer money directly from your paycheck to your CollegeAmerica account, notify your employer.

### C. Contingent deferred sales charge (CDSC) — if applicable

A contingent deferred sales charge (CDSC) will be applied to 529-C shares held for less than one year. The CDSC will also be applied to 529-A shares purchased without an initial sales charge and held for less than 18 months. Check the box below if you do not want these shares converted.

Do not convert 529-C or 529-A shares subject to a CDSC. All other shares will be converted.

### 3 Authorization

I request and authorize American Funds Service Company® (AFS) to follow the instructions on this form. In consideration of AFS acting on such instructions and processing such transactions, I agree to hold harmless and indemnify AFS; any of its affiliates or mutual funds managed by such affiliates; and each of their respective directors; trustees; officers; employees; and agents from any losses, expenses, costs or liability (including attorney fees) that may be incurred as a result of AFS acting on my instructions.

If converting 529-F-2 shares to 529-A or 529-E shares, I confirm that I (or the account owner listed in Section 1) am/is no longer part of a fee-based advisory program.

If converting to 529-F-2 shares, I confirm that I (or the account owner listed in Section 1) am/is entering a fee-based advisory program.

If this document is signed electronically, I consent to be legally bound by this document and subsequent terms governing it. The electronic copy of this document should be considered equivalent to a printed form in that it is the true, complete, valid, authentic and enforceable record of the document, admissible in judicial or administrative proceedings. I agree not to contest the admissibility or enforceability of the electronically stored copy of this document. A copy of this document will be made available to me as required.

**This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.**

	<b>X</b>	
Name of account owner (print)	Signature of account owner	Date (mm/dd/yyyy)

	<b>X</b>	
Name of financial professional (print)	Signature of financial professional	Date (mm/dd/yyyy)

**Note:** This request may be signed by either the account owner or the financial professional.

If mailing, choose the service center for your state. Mail the form to the Indiana Service Center if you live outside the U.S.



**American Funds Service Company**  
P.O. Box 6273  
Indianapolis, IN 46206-6273

**Overnight mail address**  
12711 N. Meridian St.  
Carmel, IN 46032-9181



**American Funds Service Company**  
P.O. Box 2713  
Norfolk, VA 23501-2713

**Overnight mail address**  
5300 Robin Hood Rd.  
Norfolk, VA 23513-2430

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**For more information, contact your financial professional, visit [www.capitalgroup.com](http://www.capitalgroup.com) or call us at (800) 421-4225, ext. 529.**