

Change of Trustee/ Rollover from a 529 Plan

Instructions

Complete this form to either transfer funds from an account in another 529 Plan into your LoneStar 529 PlanSM account or to redeposit funds in a LoneStar 529 Plan account within 60 days of withdrawing them from any 529 Plan. **If you do not already have a LoneStar 529 Plan account, you must also complete a LoneStar 529 Plan Account Application to complete the Rollover.**

Please print clearly in all CAPITAL LETTERS using black ink. Color in circles completely. For example: ● not ⊗ not ✓

If you have questions or would like help completing this form, call an OppenheimerFunds Customer Service Representative toll free at 1.800.445.GRAD (4723). Information is also available online at www.lonestar529.com.

Return this form and any other documents to:

LoneStar 529 Plan
 P.O. Box 173881
 Denver, CO 80217

1 | Account Information

If you are rolling funds into a new account, enclose a completed LoneStar 529 Plan Account Application.

Please complete all information below:

Account number (If you have not established an account, also complete and enclose an Account Application.)

Account owner (First name)	Middle initial	Last name	Social Security or Taxpayer ID number
Street address or P.O. Box number			
City	State	Zip	() Phone number
Beneficiary (First name)	Middle initial	Last name	Social Security or Taxpayer ID number

2 | Current 529 Plan Account Information

Complete this information and include a copy of your current account statement. Your current plan administrator may require additional documents.

Name of current 529 Administrator	Account number of 529 Plan		
Street address or P.O. Box number	() Program phone number		
City	State	Zip	State Sponsor

Does this account consist of UGMA/UTMA assets? Yes No



3 | Instructions to Current/Resigning Trustee

1. Description of Your Rollover (*permitted only once every 12 months*)/**Transfer Request** (*check one and complete additional information as applicable*):

- A.** I would like to transfer proceeds from one LoneStar 529 Plan to another LoneStar 529 Account.
- B.** I would like to move funds to a LoneStar 529 Plan from *another* Section 529 College Savings Program.
 - a.** Indicate whether this is an Indirect Rollover or a Direct Rollover request (*check one*):
 - Indirect Rollover:** I am enclosing a check representing Rollover proceeds from the following
 - Section 529 College Savings Program
 - Coverdell Education Savings Account
 - Qualified Savings Bonds
 - Direct Rollover:** I am requesting and instructing the LoneStar 529 Plan to act on my behalf to obtain funds directly from the trustee of my current Section 529 College Saving Program Account listed in Section 2.
 - Full Account Transfer
 - Partial Account Transfer (*enter dollar amount below, or enter percentage of Account here: _____%*)
 - b.** Indicate if the Designated Beneficiary is being changed in conjunction with this Rollover or Transfer (*check one*):
 - I am changing the Designated Beneficiary
 - I am not changing the Designated Beneficiary

2. Rollover/Transfer Amount

You must indicate the portion of the Transfer or Rollover attributable to contributions (basis) and earnings. Otherwise, your entire Rollover or Transfer is required to be treated as earnings which may be taxable upon withdrawal.

\$ _____
Total Amount of Rollover/Transfer

\$ _____
Base Contribution or Cost Basis of Rollover/Transfer

\$ _____
Earnings Portion of Rollover/Transfer

4 | Signatures

Many plan administrators require a Signature Guarantee. To prevent delay, contact your current plan administrator to determine if a Signature Guarantee is required.

I authorize OppenheimerFunds to act on my behalf in contacting the current 529 Plan administrator to facilitate the transfer of assets. I hereby certify that (1) the information provided herein is accurate, (2) the Designated Beneficiary on the LoneStar 529 Plan account is a "Member of the Family" of the Designated Beneficiary in the current program (as defined in the Plan Description and Trust Savings Agreement), or (3) this Rollover does not change the Beneficiary, and is the only Rollover for the Beneficiary within the past 12 months, and if applicable, (4) my contributions listed in Section 3 will have been made within 60 days of the withdrawal from another 529 Plan. I understand that if I fail to provide the required information mentioned in Section 3, the entire amount of the rollover contribution will be treated as earnings that may be taxable upon withdrawal.

Signature of Account Owner, Custodian, Trustee, Partner, or Officer

Date

Signature of Co-trustee, Partner, or Officer

Date

Signature Guarantee—A Signature Guarantee may be obtained from any eligible guarantor institution, as defined by the Securities and Exchange Commission. These institutions include banks, savings associations, credit unions and brokerage firms. The words "SIGNATURE GUARANTEED" must be stamped or typed near the signature(s) being guaranteed. The guarantee must appear with the printed name, title, and signature of an officer and the name of the guarantor institution. A NOTARY PUBLIC STAMP OR SEAL IS NOT ACCEPTABLE.

Affix medallion stamp here

Guarantee's name (if required)

Middle initial

Last name

Title

Signature Guarantee

Date

Before you mail, have you:

- Completed a LoneStar 529 Plan Account Application if you are opening a new account?
- Included documents from your current plan administrator, if required? Please make all checks payable to "LoneStar 529 Plan."
- Signed the Rollover form in Section 4?

For OppenheimerFunds use only:

The administrator of the LoneStar 529 Plan will complete this acceptance agreement.
As administrator of the LoneStar 529 Plan, we will accept the 529 Plan rollover requested.

Authorized Administrator's Signature

Date

The LoneStar 529 PlanSM is established and maintained by the Texas Prepaid Higher Education Tuition Board and distributed by OppenheimerFunds Distributor, Inc. OFI Private Investments Inc., a subsidiary of OppenheimerFunds, Inc., is the program manager and administrator of the Plan.

The LoneStar 529 PlanSM is distributed by OppenheimerFunds Distributor, Inc. Member FINRA, SIPC
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LONESTAR
===== **529 PLANSM** =====
The start of something BIG