

## Transfer of Ownership Request Form

Use this form to change, add or delete the name(s) on your account, or to change the ownership of your account. Columbia Management Investment Services Corp. (CMIS) will open a new account and transfer the shares from your current account to a new account. (A new account number may be assigned.) Do not use this form to request a transfer from a Columbia-sponsored retirement plan. **A Columbia new account application must be completed to reflect the new account information and must be submitted with the form.** An inheritance tax waiver may be required if this transfer is due to death. Contact the applicable state tax agency for guidance.

### Part 1 Account information:

I/We authorize you to transfer the amount indicated from the account number listed below to a new registration with the information provided in the attached account application.

\_\_\_\_\_  
Fund Number

\_\_\_\_\_  
Account Number

\$ \_\_\_\_\_ OR \_\_\_\_\_ OR  Check here to transfer all shares.  
Dollar amount Share amount

**If this is a full transfer, the final dividend should be:**

- paid in cash  
 reinvested into the new account

(Dividend payment will default to reinvestment if no selection is made.)

\_\_\_\_\_  
Fund Number

\_\_\_\_\_  
Account Number

\$ \_\_\_\_\_ OR \_\_\_\_\_ OR  Check here to transfer all shares.  
Dollar amount Share amount

**If this is a full transfer, the final dividend should be:**

- paid in cash  
 reinvested into the new account

(Dividend payment will default to reinvestment if no selection is made.)

\_\_\_\_\_  
Fund Number

\_\_\_\_\_  
Account Number

\$ \_\_\_\_\_ OR \_\_\_\_\_ OR  Check here to transfer all shares.  
Dollar amount Share amount

**If this is a full transfer, the final dividend should be:**

- paid in cash  
 reinvested into the new account

(Dividend payment will default to reinvestment if no selection is made.)

For assistance in completing this form, please contact us at 1 (800) 345-6611, Monday through Friday, 8:00 a.m. to 8:00 p.m. EST.

**Part 2** Customer account number:

If there is an existing account registered the same way you want the new account registered and you want to transfer your shares to this account, please provide the customer account number below.

\_\_\_\_\_  
Fund name

\_\_\_\_\_  
Fund Number and Account Number

**Part 3** Account privileges:

Please note that account privileges will not automatically carry over to your new account. If you would like to keep, add, or change privileges, please fill out the appropriate section(s) on the Columbia new account application.

**Part 4** Signature section (all current owners or authorized individuals must sign below):

**IF EITHER OF THE FOLLOWING APPLIES, A MEDALLION SIGNATURE GUARANTEE IS NOT REQUIRED:**

- You are changing from an individual account to a trust account and you are the sole trustee of the trust.
- You are changing from a joint account to a trust account and the joint owners are the sole trustees of the trust.

**YOU MUST HAVE YOUR SIGNATURE GUARANTEED BY A MEDALLION GUARANTOR TO MAKE ANY OTHER CHANGE.**

A signature guarantee is designed to protect you and the funds from fraud. You should be able to obtain a Medallion Signature Guarantee from a bank or trust company, a member firm of a national stock exchange or any other eligible guarantor institution. **A notary public cannot provide a signature guarantee.**

\_\_\_\_\_  
Print name of current owner or authorized individual/capacity

\_\_\_\_\_  
Print name of current joint owner or authorized individual (if any)/capacity

**X**

\_\_\_\_\_  
Signature of current owner or authorized individual

**X**

\_\_\_\_\_  
Signature of current joint owner or authorized individual (if any)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**Medallion Signature Guarantee Stamp**

**Medallion Signature Guarantee Stamp**

**Part 5** Return Instructions:

**Regular Mail:** Columbia Management Investment Services Corp.  
P.O. Box 8081  
Boston, MA 02266-8081

**Overnight Mail:** Columbia Management Investment Services Corp.  
c/o Boston Financial  
30 Dan Road  
Canton, MA 02021-2809

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