

Alabama Change of Designated Beneficiary Form

Use this form if you or the Designated Beneficiary are a resident of Alabama, and you are not working with a financial advisor.

CollegeCountsSM

529 FUND

Please print clearly in blue or black ink and in all capitals letters. Complete this form to change the Designated Beneficiary of your existing CollegeCounts 529 Fund accounts.

Van Kampen will change the Designated Beneficiary and will assign a new account number, but all other features of the accounts (for example, an automatic investment plan) will remain the same. Changing the Designated Beneficiary may raise gift and estate tax issues. You should consult a qualified tax advisor before requesting a Designated Beneficiary change. Van Kampen does not offer tax advice. **NOTE:** You may not change the Designated Beneficiary on assets that were originally from an UGMA/UTMA account and are still held under an UGMA/UTMA custodianship in the CollegeCounts 529 Fund accounts.

1. Provide current account information

Account Owner's First Name M.I. Last Name

Account Owner's Social Security Number

Designated Beneficiary's First Name M.I. Last Name

Designated Beneficiary's Social Security Number

2. Select a new designated beneficiary

Select a new Designated Beneficiary whose qualified higher education expenses will be paid from the account(s).

Check here if the new Designated Beneficiary is a "Member of the Family" of the former Designated Beneficiary as defined in the Program Disclosure Statement.

If the new Designated Beneficiary is not a "Member of the Family" of the former Designated Beneficiary, the change will be treated as a distribution to the Account Owner and may be subject to income taxes and additional tax penalties. "Member of the family" means an individual who is related to the Designated Beneficiary as follows: a child, or a descendant of a child; a brother, sister, stepbrother, or stepsister; the father or mother, or an ancestor of either; a stepfather or stepmother; a son or daughter of a brother or sister; a brother or sister of the father or mother; a son-in-law, daughter-in-law, father-in-law, mother-in-law, brother-in-law, or sister-in-law; the spouse of the Designated Beneficiary or the spouse of any of the foregoing individuals; a first cousin; or any other individual defined as a member of the Designated Beneficiary's family under Section 529 of the Code. For purposes of determining who is a "Member of the Family," a legally adopted child of an individual shall be treated as the child of such individual by blood. The terms brother and sister include a brother or sister by half-blood. If the new Designated Beneficiary is from a younger generation than the former Designated Beneficiary, federal gift and generation-skipping taxes may apply.

New Designated Beneficiary's First Name M.I. Last Name

Date of Birth (mm/dd/yyyy) New Designated Beneficiary's Social Security Number Applied For

Address

City State Zip Code

2. Select a new designated beneficiary (continued)

Residency Status

- U.S. Citizen Resident Alien

Alabama Prepaid Affordable College Tuition Program Participation

- Check here if the new Designated Beneficiary is the beneficiary of any PACT Program contracts.

Indicate the CollegeCounts 529 Fund account(s) affected by this update:

- Apply Change of Designated Beneficiary to **all** of the CollegeCounts 529 Fund accounts set up for the Designated Beneficiary in Section 1.
- Apply only to the CollegeCounts 529 Fund accounts indicated (refer to your latest statement for the portfolio and account numbers):

<input type="text"/>	—	<input type="text"/>
Portfolio Number		Account Number

<input type="text"/>	—	<input type="text"/>
Portfolio Number		Account Number

<input type="text"/>	—	<input type="text"/>
Portfolio Number		Account Number

<input type="text"/>	—	<input type="text"/>
Portfolio Number		Account Number

3. Indicate whether you would like to change your investment selections now

You have the option to change your investment selections at the time you change the Designated Beneficiary. Before deciding, you should review your current investments for the accounts to make sure they are appropriate for the new Designated Beneficiary. For example: If the number of years to enrollment for the new Designated Beneficiary is inconsistent with the Years to Enrollment Portfolios currently assigned to the accounts, you will need to change the investment selections at this time. Following a change in the Designated Beneficiary, the once-per-calendar-year (twice in calendar year 2009) restriction on investment selection changes will be applied to all of your accounts for the new Designated Beneficiary.

No Change to Current Investment Selections

- I do not want to change the investment selections at this time.
(The portfolios selected will remain the same, and you do not need to complete the "Mark Your Changes" section below.)

Change Investment Selections

- I want to change the investment selections at this time. The changes are indicated below.

Select the Years to Enrollment (Required)

Indicate the years to enrollment¹ (the number of years until the Designated Beneficiary will enroll in an eligible educational institution):

Note: This information is required to process the change of Designated Beneficiary, even if you do not intend to change the investment selections at this time. If you already have other CollegeCounts 529 Fund accounts on behalf of the new Designated Beneficiary, the number of years to enrollment you designate here must be the same as the number of years to enrollment on those accounts.

Mark Your Changes

Note that you may not change the Unit Class on the account in connection with a change of Designated Beneficiary and/or investment selection change.

- Indicate the portfolio, account number and, if you wish, the amount **from** which the money should be transferred in Column 1.
- Indicate the portfolio and account number **to** which the money should be transferred in Column 2. If you want to put the money into a new portfolio, write its 4-digit portfolio number (refer to the charts on page 3) in the first four boxes of Column 2.²

Mark Your Changes (continued)

1. Take money FROM this account			2. Put money INTO this existing account or new portfolio		
\$ <input type="text"/>	<input type="text"/>	— <input type="text"/>	TO	<input type="text"/>	— <input type="text"/>
Amount	Portfolio Number	Account Number		Portfolio Number	Account Number (if applicable)
\$ <input type="text"/>	<input type="text"/>	— <input type="text"/>	TO	<input type="text"/>	— <input type="text"/>
Amount	Portfolio Number	Account Number		Portfolio Number	Account Number (if applicable)
\$ <input type="text"/>	<input type="text"/>	— <input type="text"/>	TO	<input type="text"/>	— <input type="text"/>
Amount	Portfolio Number	Account Number		Portfolio Number	Account Number (if applicable)
\$ <input type="text"/>	<input type="text"/>	— <input type="text"/>	TO	<input type="text"/>	— <input type="text"/>
Amount	Portfolio Number	Account Number		Portfolio Number	Account Number (if applicable)

CollegeCounts 529 Fund Portfolios

Customize your investment by selecting one or more portfolios that suit your time horizon and risk tolerance. The following list of Portfolio options and their corresponding portfolio numbers will help you as you complete this Enrollment Form. Certain CollegeCounts 529 Fund Portfolios may not be available for purchase from time to time. Please refer to the current Program Disclosure Statement and Account Agreement for more information.

A. Years to Enrollment Portfolios*

Find the portfolio time horizon that coincides with the number of years to enrollment you indicated. (Example: If you indicated that the first withdrawal will be in 8 years, your account falls into the "9-7 Years" time horizon.) From the options available for that time horizon, select the portfolio that suits your risk tolerance.

Portfolio Time Horizons	Portfolio Number
10+Years	
Aggressive 1	1401
Moderate 1	1402
Conservative 1	1403
9-7 Years	
Aggressive 2	1404
Moderate 2	1405
Conservative 2	1406
6-4 Years	
Moderate 3	1407
Conservative 3	1408
3-2 Years	
Conservative 4	1409
1 Year or Less	
Conservative 5	1410

B. Fixed Portfolios

Portfolio Style	Portfolio Number
Equity	1411
Bond	1412
Short Term Income	1413

C. Individual Fund Portfolios

Portfolio Style	Portfolio Number
Equity and Income	1414
Comstock	1415
Small Cap Value	1416
Capital Growth	1417
Mid Cap Growth	1418
Global Franchise	1419
Government Securities	1421
Core Plus Fixed Income	1422
International Growth	1423
Small Cap Growth	1425
S&P 500 Equity Index	1426
US Bond Market Index	1427

*You must select a Years to Enrollment Portfolio in a time horizon that is consistent with the number of years assigned to the Designated Beneficiary of the account.

¹You must select a Years to Enrollment Portfolio in a time horizon that is consistent with the number of years assigned to the Designated Beneficiary of the account.

²If you are opening a new portfolio, the transfer amount must meet minimum contribution requirements. **If no amount is specified, the entire balance will be transferred.**

4. Sign this form

I certify to the best of my knowledge, the amount in the account(s) for which the Designated Beneficiary change is requested plus the total value of all accounts in the CollegeCounts 529 Fund and of any PACT Program contracts for the new Designated Beneficiary does not exceed the current CollegeCounts 529 Fund maximum account balance limitation.

I certify the information provided is true and accurate. I understand by signing this form, I am also agreeing to be bound by the terms and provisions of the Account Agreement, which is attached to the Program Disclosure statement, the CollegeCounts 529 Fund rules and title 16, Chapter 33C of the code of Alabama 1975. I understand that the terms used herein and not defined herein are used with the meanings given them in the current Program Disclosure Statement. I understand that if the new Designated Beneficiary is not a Member of the Family of the current Designated Beneficiary, the Plan will report the taxable distribution of account earnings to the Internal Revenue Service, in which case it may be subject to income taxes and additional tax penalties.

Signature of Account Owner (Sign your name as it appears on account)

Date (mm/dd/yyyy)

5. Mail the completed form

Mail signed and completed form to:

CollegeCounts 529 Fund
P.O. Box 8138
Boston, MA 02266-8138

Overnight Address:

CollegeCounts 529 Fund
30 Dan Road
Canton, MA 02021-2809

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Questions?

For more information, visit us online at www.collegecounts529.com or call 866.529.ACCT (2228).



The CollegeCounts 529 Fund—designed to be a Qualified Tuition Program under Section 529 of the Internal Revenue Code—is sponsored by the State of Alabama.

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NOT FDIC INSURED	OFFER NO BANK GUARANTEE	MAY LOSE VALUE	NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY	NOT A DEPOSIT
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