Reset Form

John Hancock Investment Management

JOHN HANCOCK FREEDOM 529 OFFERED BY EDUCATION TRUST OF ALASKA

# Unit Class Change Form

Use this form to establish a new Account in a different unit class of the same Investment Option of your current Account. Existing portfolio assets will remain in your current unit class Account.

## Contact us

**Website**
jhinvestments.com/529

**Phone**
866-222-7498

**Fax**
410-581-5174

## 1. Account Information

Account Holder, trust, or entity name

Custodian or trustee name (if applicable)

Beneficiary name

Account Holder's phone number

| Account number | Portfolio name | Existing unit class | New unit class |
|---|---|---|---|
| Account number | Portfolio name | Existing unit class | New unit class |
| Account number | Portfolio name | Existing unit class | New unit class |

All Account attributes for your existing unit class, including banking and systematic purchases, will be applied to your new unit class Account. Systematic exchanges or distributions will not transfer to the new unit class Account. If you would like to add these options, please call 866-222-7498.

☐ I do not wish to transfer existing systematic purchases to my new unit class.

## 2. Signature

I am electing to open a new account in a different unit class than originally selected on the New Account Agreement. All other information provided in the original New Account Agreement remains unchanged.

All Account attributes for your existing unit class, including banking and systematic purchases, will be applied to your new unit class Account. Systematic exchanges or distributions will not transfer to the new unit class Account. If you would like to add these options, please call 866-222-7498.

By signing below, I authorize John Hancock Freedom 529, the Program Manager, their affiliates and agents, and the Education Trust of Alaska to act on any instructions believed to be genuine and by me on this Unit Class Change Form. I understand the terms and conditions of the Plan Disclosure Document, including all fees and expenses associated with the new unit class selected above.

**We cannot process this request without a signature.**

SIGN HERE

Account Holder's signature

Date (MM/DD/YYYY)

**If your state or your designated Beneficiary's state offers a 529 plan, you may want to consider what, if any, potential state income-tax or other state benefits it offers, such as financial aid, scholarship funds, and protection from creditors, before investing.** State tax or other benefits should be one of many factors to be considered prior to making an investment decision. Please consult with your financial, tax, or other professional about how these state benefits, if any, may apply to your specific circumstances. You may also contact your state 529 plan or any other 529 education savings plan to learn more about their features. **Please contact your financial professional or call 866-222-7498 to obtain a Plan Disclosure Document or prospectus for any of the underlying funds. The Plan Disclosure Document contains complete details on investment objectives, risks, fees, charges, and expenses, as well as more information about municipal fund securities and the underlying investment companies that should be considered before investing. Please read the Plan Disclosure Document carefully prior to investing.**

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John Hancock Investment Management

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