



# USAA<sup>®</sup> 529 Education Savings Plan Asset Transfer Bonus Form

Please complete this form to sign up for the USAA 529 Education Savings Plan (the “529 Plan”) Asset Transfer Bonus program. To receive the Asset Transfer Bonus, you must rollover or transfer new funds from another 529 plan or a Coverdell education savings account outside of Victory Capital into your 529 Plan account(s) (the “Account(s)”), and remain in the Account(s) for a minimum of one year. The amount of the Asset Transfer Bonus will be based on the aggregate amount of assets transferred into your Account(s) within 60 days of the first transfer into your Account(s).

Asset Transfer Amount	Bonus Amount
\$10,000-\$24,999	\$100
\$25,000-\$49,999	\$200
\$50,000-\$99,999	\$300
\$100,000-\$499,999	\$500
\$500,000-\$999,999	\$1,000
\$1,000,000+	\$1,500

To learn more, visit [www.vcm.com/bonus](http://www.vcm.com/bonus) and read the applicable Terms and Conditions below. If you have any questions or concerns, please contact us at 800-235-8396.

## Section 1

Provide the Owner’s (Custodian’s) information for the Account(s).

_____	_____	_____
FIRST NAME	MIDDLE INITIAL	LAST NAME
_____		
STREET ADDRESS		
_____	_____	_____
CITY	STATE	ZIP CODE
_____	_____	_____
PHONE NUMBER (XXX) XXX-XXXX (REQUIRED)	EMAIL ADDRESS (OPTIONAL)	

## Section 2

Provide the asset transfer information. The FROM is the name of the 529 plan or Coverdell education savings account that you are rolling over or transferring new funds from and TO is the 529 Plan account number.

FROM _____	TO _____
FROM _____	TO _____
FROM _____	TO _____

## Section 3

Provide the 529 Plan account number into which you want your bonus payment invested.

○ **USAA 529 Education Savings Plan account number:** \_\_\_\_\_

**Fax completed form to 1-210-783-8269  
or email to [VictoryCapitalInvest@vcm.com](mailto:VictoryCapitalInvest@vcm.com).**

**If you have questions, please contact us at:  
1-800-235-8396**

## Section 4

Please read and sign below

### Terms and Conditions

This offer is subject to certain terms and conditions as set forth below and which may change without notice. By completing this Victory Capital Asset Transfer Bonus Form, you agree that you are responsible for determining whether to open one or more 529 Plan accounts (the "Accounts" and each an "Account") and transfer assets from another source into your Account(s), and for all investment decisions in your Account(s). All references to "you" refer to the Owner, as applicable. Your Asset Transfer Bonus will be invested in the Account designated in Section 3 above. You may contact a Victory Capital Service Representative at 800-235-8396 to provide instructions as to your investment choice(s) or to change your investment instructions at any time. You will receive the Victory Capital Asset Transfer Bonus payment as an investment in the Account you designated in Section 3 of the Asset Transfer Bonus Form (the "Designated Account") within approximately 90 days after the first transfer into your Account(s). Market volatility, volume, and system availability may delay account access and/or the availability of the Victory Capital Asset Transfer Bonus payment in your Designated Account.

### Victory Capital Asset Transfer Bonus Payment

To receive your Victory Capital Asset Transfer Bonus payment, your Asset Transfer Bonus Form must be received in good order within 60 days of the first transfer into your Account(s). You will receive the Victory Capital Asset Transfer Bonus payment within approximately 90 days after the first transfer into your Account(s). The maximum Asset Transfer Bonus payment amount your Account will be eligible to receive is \$1,500. Removing any assets during the promotion period (i.e., the 60 days after the first transfer into your Account(s)) may result in a lower Asset Transfer Bonus or loss of the Asset Transfer Bonus. Your Asset Transfer Bonus payment will be invested in the Designated Account. If you do not select a Designated Account, you will not receive the Asset Transfer Bonus payment.

### Restrictions Apply

New funds must be rolled over or transferred from another 529 plan or a Coverdell education savings account outside of Victory Capital into a USAA 529 Education Savings Plan (the "529 Plan") account. An Owner can receive the Asset Transfer Bonus only once.

Multiple accounts with the same tax ID number and Owner do not qualify for multiple Asset Transfer Bonus payments. This offer is available subject to the account eligibility requirements set forth in the plan description and participation agreement for the 529 Plan and is not transferable. This offer is not valid for (a) existing 529 Plan accounts that are being re-registered by a beneficiary or (b) other similar re-registrations. Only investors who make their first rollover or transfer into their 529 Plan Account(s) on or after April 24, 2023, through April 15, 2024, are eligible for this Asset Transfer Bonus program. These dates are subject to change without prior notice to you. Victory Capital reserves the right to reject an Asset Transfer Bonus Form if it believes that an investor is gaming the system. Any Asset Transfer Bonus payment made to your Account may be forfeited or reduced at Victory Capital's sole discretion if you close, transfer, terminate or otherwise withdraw your funds, in whole, or in substantial part, within 365 days of Victory Capital's receipt of such funds in good order. The decision to purchase to, from, or among accounts (including the available investment options offered by Victory Capital) may result in adverse tax consequences including capital gains and/or losses and may impact the tax basis of your investments. The tax basis for your investment may differ from the tax basis for your Asset Transfer Bonus payment. Before enrolling, consult with your tax advisor about the appropriate tax treatment for this offer and any tax implications and limitations associated with (i) rolling over or transferring assets from a 529 plan or Coverdell education savings account to a 529 Plan account and (ii) receiving the Asset Transfer Bonus payment. Any related taxes are your responsibility. Victory Capital may decline requests to enroll in this offer at its discretion.

The decision to rollover or transfer assets from another account into a 529 Plan account is an important one and Victory Capital does not provide any advice or recommendations as to whether you should do so. Carefully consider all your available options, which may include but are not limited to keeping your assets in your current account(s). Prior to making a decision, be sure to understand the benefits and limitations of your available options and consider factors such as differences in investment-related expenses, account fees, available investment options, distribution options, legal and creditor protections, tax treatment and limitations, and other concerns specific to your individual circumstances. The Victory Capital Asset Transfer Bonus program and the Asset Transfer Bonus payment should not be determinative factors in your decision to

transfer assets from another account into a 529 Plan account.

Victory Funds and the USAA 529 Education Savings Plan (Plan) are distributed by Victory Capital Services, Inc. (VCS). VCS is not affiliated with USAA. USAA and the USAA 529 Education Savings Plan logo are trademarks of United Services Automobile Association and are being used under license.

**Consider the investment objectives, risks, charges and expenses of the USAA 529 Education Savings Plan (Plan) carefully before investing. Obtain a Plan Description and Participation Agreement at [www.vcm.com/prospectus](http://www.vcm.com/prospectus) containing this and other information about the Plan from Victory Capital Services, Inc., Underwriter and Distributor. Read it carefully before investing. You should compare the Plan with any Plan offered by your home state or your beneficiary's home state and consider, before investing, any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in the home state's plan.**

## Section 5

Please read and sign below

The 529 Plan is advised by VCM and any investments or deposits you make in your Account(s), including the Asset Transfer Bonus payment, will result in fees paid to VCM and/or its affiliated companies. Such fees include investment management fees, transfer agent fees, and other related expenses associated with an investment in an Account, and may reduce the overall value of your investment over time. Investment recommendations for investing in the 529 Plan, if any, are made by VCS, an affiliate of VCM; please view VCS's Customer Relationship Summary for important information and disclosures about the services VCS provides to you. Please read it carefully and contact VCS at 800-235-8396 with any questions. Any investment recommendation made by VCS is a point-in-time recommendation based on information you provide. The recommendation will not adjust over time or be managed by VCS or VCM; neither VCS nor VCM provides ongoing monitoring of your investment account. VCS does not provide tax or legal advice. You are not obligated to act on any recommendation from VCS.

The terms and conditions of this Victory Capital Asset Transfer Bonus Form are supplemental to, and should be read in conjunction with, the terms and conditions of your account application contract, plan description, and/or other related materials.

**Victory Capital reserves the right to change the terms of, restrict, or revoke this offer at any time without advance notice. This is not an offer or solicitation in any jurisdiction where we are not authorized to do business.**

Victory Capital does not provide tax or legal advice and nothing in this document should be construed or relied upon as such. You are responsible for consulting your own tax advisor or attorney related to such matters.

### By signing below, I agree:

That the information provided is accurate and that I will continue to comply with the terms and conditions of the plan description and participation agreement. Due to the important tax consequences associated with this offer, I have been advised to consult with a tax professional.

\_\_\_\_\_  
SIGNATURE OF ACCOUNT OWNER (Custodian)

\_\_\_\_\_  
DATE