Bright Start Direct-Sold College Savings Program

Incoming Rollover Form

Rollover Type



Please read the Bright Start Direct-Sold College Savings Program Plan Description and Participation Agreement for complete Rollover information before completing this form.

- Your rollover proceeds will be invested according to the allocation instructions you provide in **Section 4**. For new Accounts, the Plan will follow the allocation instructions on the application you submit with this form.
- Complete a separate form for each account and submit a new **Account Application** along with this form, unless you already have a Plan Account for this Beneficiary.
- Complete all sections in blue or black ink and print in capital letters. Be sure to sign
 and date this form. A Medallion Signature Guarantee may be required as described in
 Section 5.

To request assistance in completing this form call us at **1-877-432-7444** Monday to Friday 7 a.m. - 7 p.m. CT

Beneficiary Social Security or Individual Taxpayer Identification Number (Required)

Rollover from a 529 Plan
Rollover from an Education Savings Account (ESA)
Bright Start Direct-Sold College Savings Program Account Information
Account Number (If you have not established an Account, complete and enclose an Account Application).
Social Security Number or Individual Taxpayer Identification Number <i>(Required)</i>
Account Owner (First name) (Required) (M.I.)
Account Owner (Last name) (Required)
Telephone Number
Beneficiary (First name) (Required) (M.I.)
Beneficiary (Last name) (Required)



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5. SIGNATURE — YOU MUST SIGN BELOW

By signing below, I certify that the information contained in this form, and in any required documentation, is true, complete and correct.

- I certify that I have read and understand, consent, and agree to all of the terms and conditions of the Bright Start Direct-Sold College Savings Program Plan Description and Participation Agreement Description, and understand the rules and regulations governing rollover contributions from other 529 plans and ESAs.
- I understand that IRS regulations permit only one such rollover for the same Beneficiary in a 12-month period for 529 Plan accounts.
- Please call the Bright Start Direct-Sold College Savings Program at 1-877-432-7444 if you have any questions concerning this process.

SIGNATURE	
Signature of Account Owner	Date (mm-dd-vvvv)

Medallion Signature Guarantee — IF APPLICABLE

Important Information. Your current 529 plan may require a medallion signature guarantee on this form and it may have additional requirements before releasing your funds. To avoid delays in processing your rollover, contact your current 529 plan for instructions before mailing this form to Bright Start Direct-Sold College Savings Program. You may be required to provide proof of your authority to act on behalf of this account to your bank or broker before a medallion signature guarantee will be provided.

- You must provide the following information as underwritten certification that your signature is genuine.
- You can obtain a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution.

 A notary public cannot provide a Medallion Signature Guarantee, nor can you guarantee your own signature.
- Do not sign below until you are in the presence of the authorized officer providing the Medallion Signature Guarantee.
- The lack of a required Signature Guarantee could delay this rollover.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the Bright Start Direct-Sold College Savings Program Plan Description and Participation Agreement..

SIGNATURE	Authorized Officer to place stamp here
Signature of Account Owner (In the presence of the authorized officer.)	
SIGNATURE	
Signature of Guarantor	
Title	
Name of Institution	
Date (mm-dd-yaya)	

6. Authorization and acceptance (No Account Owner action is necessary in this section.)

Bright Start Direct-Sold College Savings Program hereby agrees to accept the rollover described herein and upon receipt will deposit the proceeds in the Account established on behalf of the Account Owner named herein.

Authorized signature, Bright Start Direct-Sold College Savings Program

INSTRUCTIONS TO CUSTODIAN

Send redemption proceeds by check to **Bright Start Direct-Sold College Savings Program**, **P.O. Box 219288**, **Kansas City**, **MO 64121-9288**. Make the check payable to Bright Start Direct-Sold College Savings Program. Include the Account Owner name and Bright Start Direct-Sold College Savings Program Account number (*if provided*) on the check and enclose a statement that shows the principal and earnings in the account.





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