CollegeChoice Advisor 529 Savings Plan

Incoming Rollover Form

CollegeChoice Advisor

- Complete this form to initiate a direct rollover from another 529 plan or an Education Savings Account (ESA) to an existing Account in the
 CollegeChoice Advisor 529 Savings Plan (CollegeChoice Advisor). (If you have not established an Account, you must also complete and
 enclose an Enrollment Form, available at www.collegechoiceadvisor529.com.)
- Once every 12 months you may roll over assets from the same Beneficiary. You may also roll over assets at any time when you change your Beneficiary.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address below. Do not staple.

Forms can be downloaded from our website at **www.collegechoiceadvisor529.com**, or you can call us to order any form — or request assistance in completing this form — at **1.866.485.9413** any business day from 8 a.m. to 8 p.m. Eastern time.

Return this form and any other required documents to: For overnight delivery or registered mail, send to:

CollegeChoice Advisor 529 Savings Plan P.O. Box 219354 Kansas City, MO 64121

Beneficiary Social Security Number or Taxpayer Identification Number (Required)

CollegeChoice Advisor 529 Savings Plan 1001 E 101st Terrace, Suite 200 Kansas City, MO 64131

1.	Rollover type
	Transfer from 529 college savings plan (529 Plan) Transfer from Education Savings Account (ESA)
2.	CollegeChoice Advisor account information
	Account Number (If you have not established an Account, also complete and enclose an Enrollment Form.)
	Social Security Number or Taxpayer Identification Number (<i>Required</i>)
	Name of Account Owner (first, middle initial, last)
	Telephone Number
	Email
	Name of Beneficiary (first, middle initial, last)



Custod	er Ide	ntific		num	ber	as y	our A																								
Accoun	t Numb	er of 5	529 Plar	or ES	SA																										
										1													1								
Name o	f Currer	nt 529	Plan N	anage	er or	Cust	odian	(Us	ually	a fir	anci.	al inst	itutioi																		
									1	1									1				1							1	
Full Nar		l ∟ 29 Pla	LL n <i>(If ap)</i>	L olicabi	 le)		[]		_ L		_ _	_ _		_ _				_ _				_ _	_ L	_ _	_			J	
					_				1	1	7					7			1	7.			1	7	7		7			1	_
Address	_										<u> </u>													<u>J</u> L	<u> </u>	IJL					
Address	<u> </u>	. —														_				_							_			,	_
																						Ļ						_			
City																		Stat	e			Zip	Code	9							
] -	- [-	_			
Contact	Person																		Tel	epho	one	Nur	nber								
Instr The as	sets d	ns t	to cu ibed b	rre i	nt! / mu	529 ust a	Pla Il be	n l hel	Ma ı d by	na;	ger e fin	r or ancia	ESA al ins	Cu	isto tion i	dia ndic	i n ate	ed ir	n S e	ecti	ion	ı 3.	You	ır ro	love						
Instr The as accord they w	uctionsets desirations of the desiration of the	ons t escri	to cu ibed b standi	rre i elow ng al	n t ! / mu loca	529 ust a atior	Pla II be	n l hel ruc	Ma ı d by	na; the	ger e fin n file	r or ancia	ESA al ins he ti	Cu titut me t	isto tion i the a	dia ndic sset	i n :ate	ed ir	n S e	ecti	ion	ı 3.	You	ır ro	love						
Instr The as accord they w	uctionsets ding to vill be in a cone.	escrithe s	to cu ibed b standi eted ac	rrei elow ng al cord	n t! / mu loca ling	529 ust a atior to w	Pla II be inst vhat	n l hel ruc you	Ma ı d by tion ı cho	nag the sol	ger e fin n file e on	or or ancial anc	ESA al ins he ti Enro	titut me t	isto tion i the a ent l	dia ndic sset orm	i n ate as a	ed ir	n S ece	ect i eive	ion d. l	1 3. If yo	You ou h	ır ro ıave	love not	esta	blisl	ned	an		
Instr The as accord they w	sets ding to vill be it cone.	escrithe sinves	to cu ibed b standi	rrei elowing all cord	n t! / mu loca ling	529 ust a atior to w	Pla II be inst vhat	n l hel ruc you	Ma ı d by tion ı cho	nag the sol	ger e fin n file e on	or or ancial anc	ESA al ins he ti Enro	titut me t	isto tion i the a ent l	dia ndic sset orm	i n ate as a	ed ir	n S ece	ect i eive	ion d. l	1 3. If yo	You ou h	ır ro ıave	love not	esta	blisl	ned	an		
Instr The as accord they w	sets ding to vill be it cone.	escrithe sinves	ibed b standi sted ac	rrei elowing all cord	n t! / mu loca ling	529 ust a atior to w	Pla II be inst vhat	n l hel ruc you	Ma ı d by tion ı cho	nag the sol	ger e fin n file e on	or or ancial anc	ESA al ins he ti Enro	titut me t	isto tion i the a ent l	dia ndic sset orm	i n ate as a	ed ir	n S ece	ect i eive	ion d. l	1 3. If yo	You h	ave	llove not	esta	blisl	ned use	an		
Instr The as accord they w	sets ding to iill be ii cone.	escrithe sinves	ibed b standi sted ac	rrei elowing all cord	n t! / mu loca ling	529 ust a atior to w	Pla II be inst vhat	n l hel ruc you	Ma ı d by tion ı cho	nag the sol	ger e fin n file e on	or or ancial anc	ESA al ins he ti Enro	titut me t	isto tion i the a ent l	dia ndic sset orm	i n ate as a	ed ir	n S ece	ect i eive	ion d. l	13. If you	You h	ave	llove not	esta	blisl	ned use	an		
Instr The as accord they w	sets ding to rill be it cone. Roll sepa	escrithe sinves	ibed bestandigted according to the decimal of the d	rrei elowing all cord	n t! / mu loca ling	529 ust a atior to w	Pla II be inst vhat	n l hel ruc you	Ma ı d by tion ı cho	nag the sol	ger e fin n file e on	or or ancial anc	ESA al ins he ti Enro	titut me t	isto tion i the a ent l	dia ndic sset orm	i n ate as a	ed ir	n S ece	ect i eive	ion d. l	13. If you	You hou h	ave	llove not	esta	blisl	use	an		
Instr The as accord they w	sets ding to iill be ii cone.	escrithe sinves	ibed bestandigted according to the decimal of the d	rrei elowing all cord	n t! / mu loca ling	529 ust a atior to w	Pla II be inst vhat	n l hel ruc you	Ma ı d by tion ı cho	nag the sol	ger e fin n file e on	or or ancial anc	ESA al ins he ti Enro	titut me t	isto tion i the a ent l	dia ndic sset orm	i n ate as a	ed ir	n S ece	ect i eive	ion d. l	13. If you	You hou h	ave	llove not	esta	blisl	use	an		
Instr The as accord they w Check	sets ding to rill be it cone. Roll sepa Accou	escrithes inves	ibed bestandigted according to the decimal of the d	rrei	nt!	529 ust a ation to w	Pla III be instruction instruc	n l hel ruc	d by tion a cho	nag	ger e fin n file e on	ancia e at the Color	ESA inshelinshe ti	titut me t Ilmo	isto tion i the a ent I	ndic sset Form	ates a	ed in re r	n S eece	ect ive	ion d. l	3. 3. If you	You h	ir rollave	llove not	esta	blisl	use	an a	Acc	
Instr The as accord they w Check	sets ding to rill be it cone. Roll sepa Accou	escrittes inves	ibed bestandighted according to the control of the	rrei	nt!	529 ust a ation to w	Pla III be instruction instruc	n l hel ruc	d by tion a cho	nag	ger e fin n file e on	ancia e at the Color	ESA inshelinshe ti	titut me t Ilmo	isto tion i the a ent I	ndic sset Form	ates a	ed in re r	n S eece	ect ive	ion d. l	3. 3. If you	You h	ir rollave	llove not	esta	blisl	use	an a	Acc	
Instr The as accord they w Check	sets ding to rill be it cone. Roll sepa Accou	escritte sinves	ibed bestandigeted according to the cumber approximate section of the cumber arate section of the cumber are section of the cumber a	rrei	nt!	529 ust a ation to w	Pla III be instruction instruc	n l hel ruc	d by tion a cho	nag	ger e fin n file e on	ancia e at the Color	ESA inshelinshe ti	titut me t Ilmo	isto tion i the a ent I	ndic sset Form	ates a	ed in re r	n S eece	ect ive	ion d. l	3. 3. If you	You h	or rollave	not O According to According t	esta	ts, u	ned use e lee opt	an a	Acc	
Instr The as accord they w Check A.	sets ding to rill be in a cone. Roll sepa Account Acc	escritte sinves	ibed bestandigeted according to the cumber approximate section of the cumber arate section of the cumber are section of the cumber a	rrei	nt!	529 ust a ation to w	Pla III be instruction instruc	n l hel ruc	d by tion a cho	nag	ger e fin n file e on	ancia e at the Color	ESA inshelinshe ti	titut me t Ilmo	isto tion i the a ent I	ndic sset Form	ates a	ed in re r	n S eece	ect ive	ion d. l	3. 3. If you	You h	or rollave	not O According to According t	esta	ts, u	ned use e lee opt	an a	Acc	

Amount

Date (mm/dd/yyyy)

Instructions if Assets have been redeemed	
Assets redeemed from another 529 plan, Qualified U.S. Savings Bond, or ES You must include a statement from the former institution certifying the brea Until such statement is provided, CollegeChoice Advisor will treat the entire	kdown of contributions and earnings of the amount transferred.
Enclosed is a check made payable to CollegeChoice Advisor for	\$,
	S Principal Amount of Redemption
	S
Signature — YOU MUST SIGN BELOW	
If your current 529 Plan Manager or Custodian requires a Signature presence of an authorized officer of a bank, broker, or other qualifie financially responsible if the signature is not genuine. A notary pub guarantee your own signature. The lack of a required Signature Gua	d financial institution. The guaranteeing institution is lic cannot provide a Signature Guarantee, nor can you arantee could delay this rollover.
I certify that I have read and understand, consent, and agree to all of the te Savings Plan Disclosure Statement, and understand the rules and regulation and education savings Accounts. I understand that IRS regulations permit of period for 529 Accounts.	ons governing rollover contributions from other 529 plans
SIGNATURE	
Signature of Account Owner	Date (mm/dd/yyyy)
Signature Guarantee — IF APPLICABLE	
SIGNATURE	Authorized Officer to place stamp here
Signature Guarantor	
Title	
Name of Institution	

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

The CollegeChoice Advisor 529 Savings Plan 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, CollegeChoice Advisor 529 Savings Plan

INSTRUCTIONS TO CUSTODIAN

Send redemption proceeds by check to **CollegeChoice Advisor 529 Savings Plan**, **P.O. Box 219354**, **Kansas City**, **MO 64121**. Make the check payable to **CollegeChoice Advisor 529 Savings Plan**. Include the Account Owner name and the CollegeChoice Advisor 529 Savings Plan Account number (if provided) on the check and enclose a statement that shows the principal and earnings in the Account.