



**2. Receiving Account**

Account Number (Required) (If Account is already established)

Account Owner Social Security Number or Individual Taxpayer Identification Number (Last four digits Required)

Account Owner (First name) (Required) (M.I.)

Account Owner (Last name) (Required)

Beneficiary (First name) (Required) (M.I.)

Beneficiary (Last name) (Required)

Beneficiary Social Security Number or Individual Taxpayer Identification Number (Last four digits Required)

Telephone Number

**3. Transfer Amount (Check and complete Section 3A or 3B.)**

- A. Entire balance. Once the transfer is completed, the original Account will be closed.
B. Partial balance. WA529 Invest will keep the Account for the current Beneficiary open. The dollar amount you specify below will be transferred to the Account for the receiving Beneficiary identified in Section 2.

Table with 4 columns: Name of Portfolio, Dollar amount (For partial amounts.), OR, Total balance (Check if applicable.).

- C. Transfer type. If an option is not selected below, the transfer amount will be allocated according to the receiving Account's existing allocation for future contributions.

- Check one.
I want to transfer the assets in-kind. (An "in-kind" transfer will move the selected assets over to the receiving Account without a change in the currently held investment allocation(s).)
I want to transfer and allocate the assets according to the receiving Beneficiary's current allocations for future contributions. (By selecting this option, the current investments will be liquidated, and the funds will be deposited into the receiving Beneficiary's Account according to the allocation for future contributions on the new Beneficiary's Account.) This is where the transfer is going to different Portfolios.

