

2. Reason for distribution (Choose only **one** of the following options.)

- A. **Qualified Distribution to the Account Owner or Custodian.** My distribution will be used to pay for the Beneficiary's Qualified Expenses, as defined in the Program Description. (You will receive a check at your address of record.)
- B. **Qualified Distribution to the Bank Account of the Account Owner or Custodian.** My distribution will be used to pay for the Beneficiary's Qualified Expenses, as defined in the Program Description. My distribution should be sent via Electronic Fund Transfer (EFT) using banking instructions on file with CollegeBound Saver. (You cannot change or add banking instructions at the same time of the distribution request via EFT.)
- C. **Qualified Distribution to the Beneficiary.** My distribution will be used to pay for the Beneficiary's Qualified Expenses. (The Beneficiary will receive a check at the Beneficiary's address of record.)

D. **Qualified Distribution to an eligible college or university.** (Provide the exact school address below.)

Name of School (Complete only if the distribution is to be sent directly to the school.)

Department / Office / Contact Name

Beneficiary's Student ID

Mailing Address

City

State

Zip Code

- E. **Indirect rollover.** I will invest my distribution in another 529 plan within the next 60 days. (You will receive a check at your address of record.)
- F. **Non-Qualified Distribution to the Account Owner.** My distribution will not be used to pay for the Beneficiary's Qualified Expenses. (You will receive a check at your address of record.)
- G. **Non-Qualified Distribution to the Beneficiary.** My distribution will not be used to pay for the Beneficiary's Qualified Expenses. (The Beneficiary will receive a check at the Beneficiary's address of record.)

5. Medallion Signature Guarantee — REQUIRED IF THE ADDRESS HAS CHANGED WITHIN THE LAST NINE BUSINESS DAYS AND YOU WOULD LIKE TO WAIVE THE NINE BUSINESS DAY HOLD PERIOD FOR THIS WITHDRAWAL REQUEST.

- You must provide the following information as underwritten certification that the new 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 Authorized Officer the Medallion Signature Guarantee.**

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 CollegeBound Saver Program Description.

SIGNATURE

Signature Guarantor

Title

Name of Institution

□□ — □□ — □□□□

Date (mm/dd/yyyy)

Authorized Officer to place stamp here

Empty box for authorized officer stamp.



State of Rhode Island
Office of the General Treasurer
Seth Magaziner

