



## Mississippi ABE Incoming Indirect Rollover Form

- Use this form to contribute to the Mississippi ABE Account by Indirect Rollover from another ABE account or a Section 529 Education Savings Plan using a check. An Indirect Rollover occurs when assets are withdrawn from an ABE or Section 529 Education Savings Plan account by check or EFT, and subsequently contributed to an ABE account within 60 days of the withdrawal date. (To initiate an Indirect Rollover by EFT, contact the Plan).
- Do not use this form to initiate an incoming Direct Rollover from another ABE plan or a Section 529 Education Savings Plan. Please complete and submit an Incoming **Direct Rollover Form** instead.
- An Indirect Rollover from another ABE account can only come from: (1) the Account Owner's account in another ABE program; or (2) a Sibling's ABE account.
- For Indirect Rollovers between the same Account Owner: (i) the entire balance of the preexisting ABE account must be withdrawn and subsequently contributed in whole or in part to the Mississippi ABE Account, (ii) the Indirect Rollover must be completed and the preexisting ABE account closed within 60 days of the date the Rollover assets were withdrawn from the preexisting ABE account, and (iii) an Indirect Rollover may only take place once in any 12-month period.
- A Section 529 Education Savings Plan Rollover can come from all or part of the assets of a Section 529 Education Savings Plan. The designated beneficiary of the Section 529 Education Savings Plan account must be the ABE Account Owner or a "member of the family" (as defined in Section 529) of the ABE Account Owner. For a transfer from a Section 529 Education Savings Plan to be treated as an indirect Section 529 Education Savings Plan Rollover, the assets must be withdrawn and contributed to the receiving ABE account within 60 days.
- Account Owners and/or their Authorized Individuals should carefully review the information in the Plan Disclosure Booklet related to Indirect Rollovers and Section 529 Education Savings Plan Rollovers, as well as the potential consequences related to a transfer of assets that does not meet the Rollover conditions described in the Plan Disclosure Booklet.
- **Important:** Contributions to the Asset Allocation Options will be available for withdrawal after 5 to 6 business days or 15 calendar days following a change to bank information. Contributions to the Checking Account Option will be available for withdrawal after 6 or 7 business days.
- Capitalized terms used in this form but not defined in the form, have the meanings provided in the Plan Disclosure Booklet.
- Type or print clearly, printing in capital letters and black ink. Please mail the form to the Plan. Do not staple.

**Note:** This contribution will be invested according to the standing allocation instructions on file for the Account at the time this form is received in good order. Standing allocation instructions can be updated online by logging into the Account or by completing the Investment Option Change Form.

Forms can be downloaded from our website at [ms.savewithable.com](https://www.ms.savewithable.com), or you can call Customer Service to request any form — or request assistance in completing this form — at **1.888.609.3469** any business day from 8 a.m. to 5 p.m. CT.

 **1.888.609.3469**  
8 a.m. to 5 p.m. CT M-F

**FAX 1.617.559.8944**

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**Kansas City, MO 64121**

Overnight mailing address:

**Mississippi ABE**  
**1001 E 101st Terrace, Suite 200**  
**Kansas City, MO 64131**

1. Account Information

Account Number (Include the Mississippi ABLE Account number on the check).

Account Number (Include the Mississippi ABLE Account number on the check).

Account Owner's Legal First Name (M.I.)

Account Owner's Legal Last Name

Telephone Number used for the Account

2. Rollover type

- Indirect Rollover from the Account Owner's ABLE account in another plan into the Account Owner's Mississippi ABLE Account.
Indirect Rollover from a Sibling's ABLE account in another plan or this Plan into the Account Owner's Mississippi ABLE Account.
Indirect Section 529 Education Savings Plan Rollover from the Account Owner's Section 529 Education Savings Plan into the Account Owner's Mississippi ABLE Account.
Indirect Section 529 Education Savings Plan Rollover from a Section 529 Education Savings Plan account in which the beneficiary of the Section 529 Education Savings Plan is a "member of the family" (as defined by Section 529) of the ABLE Account Owner.

3. Additional Information

A. For an Indirect Rollover from the Account Owner's or a Sibling's ABLE account: Provide principal (basis) and earnings information below. Alternatively, along with the check payable to the Plan, you may include a statement from the former ABLE plan showing the principal (basis) and earnings portion of the amount transferred.

Amount of Rollover

Principal (Basis)

Earnings

B. Required for Indirect Rollovers between ABLE accounts of the same Account Owner: The Plan is required to account for current year contributions and investment option changes made in the preexisting ABLE account. Please provide that information below.

Current Year Contribution Amount

Number of current year investment option changes (check the appropriate box below)

Zero One Two

C. Indirect Section 529 Education Savings Plan Rollover: Provide principal (basis) and earnings information below. Alternatively, along with the check payable to the Plan, you may include a statement from the Section 529 Education Savings Plan showing the principal (basis) and earnings portion of the amount transferred.

Amount of Rollover

Principal (Basis)

Earning



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