

EDVESTSM 529
Your Partner in Saving for Higher Education

To request assistance in completing this form call us at **1.888.338.3789**, Monday through Friday from 7 a.m. – 9 p.m. CT.

Overnight mailing address:
Edvest College Savings Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

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[illegible]

Name of Investment Portfolio	Dollar amount (For partial amounts.)	OR	Total balance (Check if applicable.)
<input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>		<input type="text"/>
<input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>		<input type="text"/>
<input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>		<input type="text"/>

- ☐ 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 investment portfolios.

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