



**Path2College 529 Plan
Withdrawal Request Form**
Use this form to withdraw funds from the Plan
Questions? Call toll-free 1-877-424-4377
PO Box 55924, Boston, MA 02205-5924
Visit www.path2college529.com

Instructions

- Complete a separate form for each type of withdrawal for each designated payee and/or for each Beneficiary.
- Print in capital letters with blue or black ink, sign and date the form, then mail it to the Plan at the above address.
- A Medallion Signature Guarantee¹ is required in Section 5: (i) for withdrawal requests of \$100,000 or more; (ii) for an entity Account or an Account for which the individual completing the form is acting in a legal capacity as a representative of the Account Owner or (iii) if the address on the account has been changed or the Account was transferred to a new Account Owner in the past 30 days.

1 Account Information

Account Number	Account Owner Telephone Number
Account Owner Name (First, MI, Last)	
Beneficiary Name (First, MI, Last)	

2 Select a Payee

- Account Owner** (This will be the tax responsible party who will receive the 1099Q form).
- Beneficiary** (This will be the tax responsible party who will receive the 1099Q form).
- School** (The beneficiary will be the tax responsible party who will receive the 1099Q form).
You will need your beneficiary's student ID to complete this withdrawal.

PLEASE NOTE: It generally takes 7-10 business days for the school to receive the check and additional time for processing. If you need it sooner, please contact our telephone representatives at the telephone number above.

3 Withdrawal Information

Tell us how much to withdraw from this Account. Write a specific amount or "ALL" next to each Investment Option.

Investment Option Name <i>(write in the option name(s) from the list)</i>	Indicate a specific amount or write "ALL"					
	\$,			.
	\$,			.
	\$,			.
	\$,			.
	\$,			.
Total Withdrawal Amount	\$,			.

Note: Funds cannot be withdrawn until 10 days after the receipt of each contribution. If applicable, a separate payment will be made to the payee designated in Section 5 once the units are available for withdrawal.

- This withdrawal is not being used for qualified higher education expenses. This information is being collected on behalf of the Plan and will not affect how your withdrawal will be reported to the Internal Revenue Service. For more information about withdrawals, please refer to the Plan Disclosure Booklet. You should consult with a qualified advisor regarding how tax laws may apply to your particular circumstances.

¹ A Medallion Signature Guarantee is available from banks or trust companies, savings banks, savings and loan associations or members of a national stock exchange and warrants that the signer is the appropriate person to provide instruction. A notary public **cannot** provide a Medallion Signature Guarantee. Please contact your bank or broker, if needed.

Investment Option Names

Managed Allocation Option (Age based)

Aggressive Managed Allocation Option (Age based)

100% Equity Option (1213)

Money Market Option (1390)

Balanced Fund Option (1214)

Fixed Income Option (1389)

Guaranteed Option (1215)

4 Systematic Withdrawal Information *(Optional)*

By completing this section, you authorize the Plan to systematically withdraw funds from your Account and to pay such amounts to the payee indicated in Section 2. These systematic withdrawals will continue until the Investment Option from which the systematic withdrawal is made has insufficient funds to continue making payments or you advise the Plan in writing to stop making such payments.

✓ **Select the frequency of your withdrawals.**

<input type="checkbox"/> Monthly	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Annually
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✓ **Select the month(s) of your withdrawals.**

<input type="checkbox"/> Every Month (or →)	<input type="checkbox"/> Jan.	<input type="checkbox"/> Feb.	<input type="checkbox"/> Mar.
	<input type="checkbox"/> Apr.	<input type="checkbox"/> May	<input type="checkbox"/> June
	<input type="checkbox"/> July	<input type="checkbox"/> Aug.	<input type="checkbox"/> Sep.
	<input type="checkbox"/> Oct.	<input type="checkbox"/> Nov.	<input type="checkbox"/> Dec.

✓ **Select the date(s) of your withdrawals.**

<input type="checkbox"/> 1st	<input type="checkbox"/> 15 th	<input type="checkbox"/> Other _____
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5 Select a Delivery Method

Check this box for overnight delivery *(Optional, \$15 will be deducted from your Account.)*

Pay by Check *(A check will be mailed to your or your beneficiary's address of record.)*

Pay by Electronic Funds Transfer (EFT) *(Funds will be received by your or your beneficiary's bank in a few days.)*

You may select this option only if your banking information has been on file for at least 30 days and it has been verified by your bank. Before selecting this option, you may call to confirm your bank account information.

- Your bank account will be credited separately for the amount of contributions and earnings, if any, withdrawn from **each** Investment Option. Depending upon the number of Investment Option you own, you could receive multiple deposits into your bank account.
- If you select this method but you do not have a bank account on file or if your banking information has been added or changed within 30 days, a check will be mailed to your address of record.

Pay to Eligible Educational Institution *(A check will be mailed to the institution designated below.)*

Please confirm the mailing instructions with your school before submitting this form for payment and provide a student ID, if required by the school. **Note:** Payments for qualified expenses for a foreign Eligible Educational Institution will be paid directly to the Account Owner.

Eligible Educational Institution Name (School)

Student Name, ID or other Identifying Information (This information will appear only on the check.)

School Mailing Address (Line 1)

School Mailing Address (Line 2)

School City, State, Zip

6 Signature and Certification *(This section must be signed or the withdrawal cannot be processed.)*

By signing below, I certify that the information contained in this Form, and in any required documentation, is true, complete and correct. I authorize a withdrawal from my Account based on this information. I understand and agree to all terms of the withdrawal as presented on this Form.

If this withdrawal is for Qualified Higher Education Expenses, I further certify that:

The requested withdrawal represents qualified higher education expenses for the enrollment or attendance of my Beneficiary at an Eligible Educational Institution. To the best of my knowledge, no other request has been previously submitted to this Plan, or to any other Qualified Tuition Program, for reimbursement or payment of this/these expenses by me or my Beneficiary. To the best of my knowledge, withdrawals for room and board expenses of the Beneficiary for the applicable academic year have not exceeded the limitations described in the *Withdrawal Guidelines*.

If I am participating in the Automatic Contribution Plan (ACP), my participation in ACP will be cancelled if I have requested a withdrawal of my entire Account balance (in all Investment Options) but it will continue if I have only requested a partial withdrawal from my Account unless an *Electronic Banking Information Form* accompanies this form.

If I am making contributions by payroll deduction, I understand that my payroll contributions will continue into this Account, regardless of the amount withdrawn, unless an updated *Payroll Deduction Form* accompanies this form to reallocate payroll contributions among my Account(s). I also understand that I must notify my employer if I want to stop or change the amount of my payroll deduction.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner. (If I am an individual acting in a legal capacity as a representative of the Account Owner, or an entity Account Owner, a Medallion Signature Guarantee appears below.) If I am withdrawing my entire account balance, I request the cancellation of my *Participation Agreement* and the closure of my Account.

Signature of Account Owner, Custodian or Authorized Representative of an Individual or Entity Account Owner

Date

Important Information

A Medallion Signature Guarantee is required for all entity Accounts or Accounts for which the individual completing this form is acting in a legal capacity as a representative of the individual Account Owner or if the address on the account has been changed or the Account was transferred to a new Account Owner in the past 30 days. You may be required to provide proof of your authority to act on behalf of this Account to your bank or broker before a Medallion Signature Guarantee will be provided.

Note: A Medallion Signature Guarantee is not required if a *Plan Power of Attorney Form* is on file for an Individual Account, or if a *Plan Power of Attorney Form* accompanies this form.

GUARANTOR TO AFFIX STAMP HERE

Mail this form to:

Path2College 529 Plan
PO Box 55924
Boston, MA 02205-5924

A12343:03/17.

