

# PRIVATE COLLEGE 529 PLAN

by CollegeWell

## Private College 529 Plan Incoming Rollover Form

Upload to: [access.pc529.com](https://access.pc529.com)

- ▶ Complete this form to contribute funds from another Qualified Tuition Program (QTP) to your existing Private College 529 Plan account. Private College 529 Plan cannot initiate the rollover of funds from your current QTP. You must contact your current QTP to initiate the rollover of funds.
- ▶ **Note:** Failure to provide required information may result in a delay of processing your request.
- ▶ Please consult a qualified financial, legal and/or tax advisor regarding the application of federal, state, and local tax law before submitting your rollover request.
- ▶ If you do not have a Private College 529 Plan account for the Beneficiary, you must submit an online application at [access.pc529.com](https://access.pc529.com) before submitting this form.
- ▶ **Complete a separate form for rollovers to more than one account, and upload to [access.pc529.com](https://access.pc529.com).**
- ▶ **Questions?** Call us at **1-888-718-7878**.

### 1. ACCOUNT INFORMATION *(This is your existing Private College 529 Plan account.)*

- ▶ You can rollover assets into a Private College 529 Plan account for the same Beneficiary or for another Beneficiary who is a "member of the family" of the original Beneficiary, as described in the Plan Disclosure Statement.
- ▶ Funds that were previously on deposit in an UGMA/UTMA account can only be deposited into an UGMA/UTMA account for the same Beneficiary within Private College 529 Plan.

#### Who is the Private College 529 Plan Beneficiary?

☐ Same Beneficiary ☐ New Beneficiary (excluding UTMA/UGMA)

#### Type of Account?

☐ Individual ☐ Custodial (UTMA/UGMA) ☐ Entity

Account Number

Account Owner, Custodian, or Entity Name (first, MI, last, suffix)

Last 4 Digits of Account Owner's  
Social Security Number or Taxpayer ID Number

Daytime Phone Number

Evening Phone Number

Beneficiary Name (first, MI, last, suffix)

Last 4 Digits of Beneficiary's  
Social Security Number or Taxpayer ID Number

### 2. ROLLOVER AMOUNT

#### Indirect Rollover from another QTP.

- ▶ Indicate the amount of your rollover below.
- ▶ You may contribute the rollover funds online at [access.pc529.com](https://access.pc529.com) or via check.
- ▶ You must submit this form online at [access.pc529.com](https://access.pc529.com).
- ▶ Your rollover check must be received within 60 days of the date of withdrawal from the other program or account.

#### Contributions

\$

Amount

#### Earnings

\$

Amount

#### Total Indirect Rollover

\$

Amount

**Please note:** Unless the Plan receives a statement or documentation detailing a breakdown of contributions and earnings, the entire rollover amount will be treated as earnings and will be reported as earnings upon withdrawal.

### 3. CURRENT QTP INFORMATION

The account from which you are transferring assets must have the same Account Owner name and Social Security Number or Taxpayer Identification Number as your Private College 529 Plan account. Please contact your current QTP for the proper mailing address.

<input type="text"/>	<input type="text"/>
<b>Account Number at Current QTP</b>	<b>Last 4 Digits of Account Owner's Social Security Number or Taxpayer Identification Number</b>
<input type="text"/>	<input type="text"/>
<b>Account Owner Name at Current QTP</b> (first, MI, last, suffix)	<b>Beneficiary Name at Current QTP</b> (first, MI, last, suffix)
<input type="text"/>	
<b>Name of Current QTP</b>	
<input type="text"/>	<input type="text"/>
<b>Mailing Address Line 1</b>	<b>Mailing Address Line 2</b>
<input type="text"/>	<input type="text"/>
<b>City</b>	<b>State</b>
	<input type="text"/>
	<b>ZIP Code</b>

### 4. SIGNATURE & AUTHORIZATION (This section must be signed.)

By signing below, I agree to the terms and conditions set forth below and in the Disclosure Booklet and Enrollment Agreement. I understand and agree that these documents govern all aspects of this account and are incorporated herein by reference.

**I certify that I am the Account Owner, or I have the authority to act on behalf of the Account Owner, and additionally that:**

It is my intent to make a complete or partial rollover to the Plan. I understand that tax-free rollovers must meet certain requirements that are summarized in the Plan Disclosure Statement and Enrollment Agreement. I understand that at any time the value of my account(s) may be more or less than the amounts I contributed to such account(s).

I hereby certify that (1) all of the information provided by me on this form is, and all information provided by me in the future will be, true, complete and correct, (2) the Designated Beneficiary on the Private College 529 Plan account is a "member of the family" of the Designated Beneficiary in the current program (as defined in the Plan Disclosure Statement), or (3) this Rollover does not change the Beneficiary, and is the only rollover for the Beneficiary within the past 12 months, and, if applicable, (4) the transfer of rollover proceeds from the current QTP account pursuant to my instructions will be made within 60 days of my receipt of the proceeds. I authorize the Plan to act on my instructions based upon this information. I have received, read and understand this form and the Plan Disclosure Statement, including the Enrollment Agreement. I understand that the Plan Sponsor may from time to time amend the Plan Disclosure Statement and Enrollment Agreement and I understand and agree that I will be subject to the terms of those amendments. If I am issuing instructions for an account in a representative capacity (e.g., as a Trustee of a Trust or pursuant to a Power of Attorney), I understand and acknowledge that I am assuming any responsibility for any adverse consequences resulting from my instructions. I further agree that neither Private College 529 Plan nor its agents will be liable for any loss, liability, cost or expense for acting upon these instructions, except to the extent required by applicable law.

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

\_\_\_\_\_  
**Date**

Private College 529 Plan (the Plan) is established and maintained by Tuition Plan Consortium, LLC (TPC). Intuition College Savings Solutions, LLC (Intuition) is the Plan Administrator. Participation in the Plan does not guarantee admission to any college or university. Tuition Certificates are neither insured nor guaranteed by the FDIC, TPC, any government agency, Intuition or their respective subcontractors and affiliates. However, Tuition Certificates are guaranteed by colleges and universities solely for tuition and mandatory fee credits. Please read the Disclosure Statement and Enrollment Agreement carefully and consider your financial objectives and risks before purchasing a Tuition Certificate. TPC, Intuition and their respective subcontractors and affiliates do not provide financial, legal or tax advice. See [www.privatecollege529.com](http://www.privatecollege529.com) for more information.