



EZ Transfer Between CollegeAdvantage Accounts

Complete this form and return to:
CollegeAdvantage 529 Savings Plan
P.O. Box 932355
Cleveland, OH 44193

Instructions:

- Use this form to transfer ALL assets from one CollegeAdvantage account to another. Please print clearly in blue or black ink.
- **Do not** use this form if you wish to transfer assets and the following conditions apply. Instead, use the full version *Transfer Form*:
 - 1) Account receiving assets does not already exist
 - 2) You only wish to transfer a partial amount
 - 3) You want to change the investment options for the new Beneficiary
 - 4) You are transferring assets from the suspended Guaranteed Savings Fund
- The new Beneficiary must be a Member of the Family of the prior Beneficiary, as defined in the *CollegeAdvantage Offering Statement and Participation Agreement*.
- Assets may not be transferred if the original account was established with custodial funds (UTMA or UGMA, for example).
- The assets requested to be transferred from the original account will be liquidated and new assets purchased with the proceeds.
- Any existing EFT instructions on file for the original account will stop.
- **SIGNATURE REQUIRED** on last page. This form must be notarized.

1

Account Owner information

Account Owner's first name M.I. Last name

Account Owner's Social Security number

2

Current Beneficiary information

Please provide information for the Beneficiary you want to transfer FROM.

Current Beneficiary's first name M.I. Last name

CollegeAdvantage account number

3

New Beneficiary information

Please provide information for the Beneficiary you want to transfer assets TO.

New Beneficiary's first name M.I. Last name

New Beneficiary's CollegeAdvantage account number

Relationship of new Beneficiary to current Beneficiary

Signature required ➔

INFORMATION REGARDING THE FOLLOWING INVESTMENT OPTIONS:

FIFTH THIRD 529 CDS—If you are transferring a CD, it is by definition not yet mature. Mature CDs are systematically redeemed at maturity and the redemption value placed in a 529 savings account, which was established for you when the CD was opened. When a CD is transferred from one account to another, the CD is liquidated, any applicable early redemption penalty applied, and a new CD purchased at the interest rate in effect on the day of the purchase. The term of the new CD will start on the day of the purchase of the new CD (For example, the proceeds of a 3-year CD redeemed because of a transfer to a different Beneficiary will purchase another 3-year CD, and the 3-year term will begin on the day the new CD is purchased.)

CD Early Withdrawal Penalty: If you redeem a 3- to 11-month CD before at least half the stated term is over, or a 12- to 144-month CD before at least a third of the term is over, you may lose all interest accrued and possibly part of your principal. CD will be liquidated upon receipt of this form, and any applicable early redemption penalty will be applied to the redemption.

AGE-BASED OPTIONS—Account Owners who are invested in an age-based investment option should note that even though no change in investment option is requested at the time of the transfer, the particular Portfolio in which the account is invested may change if the new Beneficiary is in a different age bracket. This change will be made so that the Portfolio investment corresponds to the age of the new designated Beneficiary. The change may result in a loss in the value of the account depending on market fluctuations during the time of the change.

4

Signature

I hereby elect to transfer all assets from one CollegeAdvantage account to a different CollegeAdvantage account for the Beneficiary indicated herein. I certify that the information contained herein is true and correct, and that the Social Security number provided in Section 1 is correct. I understand this transaction may have tax consequences. Note: If you elect to transfer to a Fifth Third Bank Investment Option, then your signature below, together with this form and current *Offering Statement and Participation Agreement*, which includes Fifth Third Bank’s Rules, Regulations, Agreements and Disclosures, constitutes the Deposit Agreement between you and Fifth Third Bank.

Print name of Account Owner

Signature of Account Owner (Required)

____ - ____ - ____

Signature date (mm/dd/yyyy)

NOTARY SEAL REQUIRED

Before me, a Notary Public in and for _____, _____, this document was acknowledged before me on _____
County State Date

by _____ who certifies the correctness of the signature above.
Account Owner

Notary to Place Seal Here

Notary Public name

Notary Public signature

My commission expires _____
Date