

Beneficiary Date of Birth (MM/DD/YYYY)

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Beneficiary SSN/TIN

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If the Beneficiary has an Authorized Legal Representative, please complete the following information for the Representative:

Full Name

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Date of Birth (MM/DD/YYYY)

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SSN/TIN

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2 Incoming Rollover Information

TELL US ABOUT YOUR ROLLOVER:

Is the Beneficiary of the CalABLE Account the same as the beneficiary on the 529 college savings account or other qualified ABLE account you are rolling over?

- Yes
- No, but I certify that the new Beneficiary listed below is qualified as a “Member of the Family” of the Qualified ABLE Program Account as defined by section 529 of the Internal Revenue Code

Dollar amount of Rollover	\$
Earnings Portion of Rollover (<i>amount earned on the other QAP account</i>)	\$
Year-to-Date Contributions to the other QAP	\$
Date of Establishment (<i>date the other QAP was originally established</i>) MM/DD/YY	/ /

Please note: Unless you provide all of the above information or documentation detailing a breakdown of contributions and earnings, the entire rollover amount will be treated as earnings and will be reported as earnings for tax purposes.

529 College Savings Plan or Qualified ABLE Plan Account Number

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Account Owner Social Security Number

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Account Owner Name (First, MI, Last, Suffix)

Beneficiary Name (First, MI, Last, Suffix)

529 College Savings Plan or Qualified ABLE Plan Account Name

529 College Savings Plan or Qualified ABLE Plan Account Mailing Address Line 1

529 College Savings Plan or Qualified ABLE Plan Account Mailing Address Line 2

529 College Savings Plan or Qualified ABLE Plan Account City

State

Zip Code

CalABLE will contact your current 529 College Savings Plan or Qualified ABLE Plan Account Administrator to send the funds to us. The current 529 Plan or Qualified ABLE Plan Account Administrator may require a signature guarantee to complete this rollover. Please confirm with the current 529 College Savings Plan or Qualified ABLE Plan if they require a signature guarantee and provide at the end of this form.

The Beneficiary of the CalABLE Account will become the owner of the rollover funds even if that beneficiary was not the owner of the 529 College Savings Account or Qualified ABLE Plan Account.

Rollover funds are subject to the same \$15,000 annual limit as other contributions to your CalABLE Account. If you have a remaining balance in your 529 College Savings Account after completing this rollover, we encourage you to take advantage of initiating rollovers on an annual basis.

The Beneficiary of the CalABLE Account must be the same as the Beneficiary of the 529 College Savings Account or must be qualified as a "Member of the Family" of the CalABLE Account Beneficiary as defined by section 529 of the Internal Revenue Code.

