





**4. Reason for Withdrawal** (Choose **only one** of the following six options.)

**Note:** Withdrawals can also be requested by logging into your account at **www.PA529.com**.

- A.  **Qualified withdrawal to the account owner.\*** My withdrawal will be used to pay for the beneficiary's qualified higher-education expenses. (You will receive a check at your address of record.)
- B.  **Qualified withdrawal to the beneficiary.\*** My withdrawal will be used to pay for the beneficiary's qualified higher-education expenses. (The beneficiary will receive a check at the address you indicated in **Section 2**.)
- C.  **Qualified withdrawal to an eligible college or university.\*** (Provide the **exact** school address below.)

**Name of School** (Complete only if the withdrawal is to be sent directly to the school.)

Department/Office/Contact Name or Student ID

Mailing Address

City

State

Zip

Telephone Number

- D.  **Indirect rollover.** Send a check to me at my address of record. I will invest it in another qualified 529 plan within the next 60 days.
- E.  **Nonqualified withdrawal to the account owner.\*\*** My withdrawal will **not** be used to pay for the beneficiary's qualified higher-education expenses. (You will receive a check at your address of record.)
- F.  **Nonqualified withdrawal to the beneficiary.\*\*** My withdrawal will **not** be used to pay for the beneficiary's qualified higher-education expenses. (The beneficiary will receive a check at the address you indicated in **Section 2**.)

**5. Signature—YOU MUST SIGN BELOW**

I certify that I have read the Disclosure Statement and understand the rules and regulations governing withdrawals from the PA 529 Investment Plan. (Please allow up to ten business days to receive your distribution.)

▶

**Signature of Account Owner**

Date (month, day, year)

\*The IRS may require you to prove that your withdrawal is qualified. Consult the IRS or your tax advisor for current documentation requirements.

\*\*The earnings portion of a distribution not used for a beneficiary's qualified higher-education expenses is considered a nonqualified withdrawal and may be subject to federal income tax and a 10% federal penalty tax, and may also be subject to state and local income tax. Exceptions to this penalty include withdrawals made because the beneficiary has become disabled, received a scholarship, or died. Contact your tax advisor about how to report a nonqualified withdrawal.



Blank Page