

Pennsylvania 529 Investment Plan Withdrawal Request Form



- You can request a qualified withdrawal by logging into your account at www.PA529.com.
- Complete this form to request a qualified withdrawal or nonqualified withdrawal from your account. You must submit a separate form for each type of withdrawal you are requesting. Allow up to ten business days to receive your distribution. **Note:** The earnings portion of a nonqualified withdrawal may be subject to federal income tax and a 10% federal penalty tax, and may also be subject to state and local income tax.
- If the address or bank information to which you have requested the withdrawal be sent has changed in the last 15 calendar days, your withdrawal will be held until this waiting period has been satisfied. Contributions and rollovers by check or electronically will not be available for withdrawal for ten calendar days.
- Print clearly, preferably in capital letters and black ink.

Forms can be downloaded from our website at www.PA529.com. Or you can call us to order any form at **1-800-440-4000** on business days from 8 a.m. to 6 p.m., Eastern time. Return this form in the enclosed envelope, or mail to: **Pennsylvania 529 Investment Plan, P.O. Box 55378, Boston, MA 02205-5378**. For overnight delivery or registered mail, send to: **Pennsylvania 529 Investment Plan, 95 Wells Avenue, Suite 155, Newton, MA 02459-3204**.

1. Account Owner Information

Account Number

(required)

Social Security Number or Other Taxpayer ID Number

Name of Account Owner (first, middle initial, last)

Daytime Telephone Number

Evening Telephone Number

2. Beneficiary Information

(required)

Social Security Number or Individual Taxpayer ID Number

Name of Beneficiary (first, middle initial, last)

Mailing Address

City

State

Zip

REMEMBER TO SIGN IN SECTION 5.



* P A W I T H D R A W A L *

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

Note: Qualified withdrawals can 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.)

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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.

