

Customer Information:

**Name of Account Owner or Authorized Representative
of Business/Organization/Trust**

Daytime Telephone Number

Account Number

Name of Beneficiary (Student)

You may use this form to roll over another 529 college savings plan, a qualified U.S. Savings Bond, or a Coverdell Education Savings Account to the Florida 529 Savings Plan, or to transfer an UTMA/UGMA account to the Florida 529 Savings Plan.

For each of the following types of rollover contributions, you **MUST** attach the described documentation, or the entire amount of the rollover contribution will be treated as earnings and may be considered taxable income:

- **Another 529 College Savings Plan:** Statement issued by the distributing 529 college savings plan showing the earnings portion of the distribution.
- **U.S. Savings Bond [IRS Code Section 135 (c)(2)(C)]:** Statement from the financial institution that redeemed the bond showing the interest from the redemption of the bond.
- **Coverdell Education Savings Account (Education IRA):** Statement from the financial institution that acted as the custodian of the account showing the earnings.
- **UTMA/UGMA:** Certified copy of the document establishing the account.

To request a rollover *from* the Florida 529 Savings Plan, please download a Cancellation-Rollover Form from www.myfloridaprepaid.com/forms or call us at 1-800-552-GRAD (4723) and *press prompt 3* for assistance.

PLEASE MAKE YOUR CHECK OR MONEY ORDER PAYABLE TO:

**Florida 529 Savings Plan
PO Box 31483
Tampa, FL 33631-3483**

TOTAL CONTRIBUTION AMOUNT: \$ _____

EARNINGS PORTION OF ROLLOVER: \$ _____

CONTRIBUTIONS PORTION OF ROLLOVER: \$ _____

Please include your account number on your check or Money Order.