

## Coverdell Education Savings Account Funding a 529 Plan Request

Use this form to request a one-time withdrawal from a BlackRock Coverdell Education Savings Account ("Coverdell ESA") and use the proceeds to fund a BlackRock CollegeAdvantage<sup>®</sup> 529 account.

- ▶ Any withdrawal from your account may be reported to the IRS
- ▶ Withdrawal requests in excess of \$100,000 for Investor Shares require a Medallion Signature Guarantee stamp

Send this form, along with any other required documents, to:

▶ **Regular mail:**

BlackRock Funds  
PO Box 534429  
Pittsburgh PA  
15253-4429

▶ **Overnight mail:**

BlackRock Funds  
Attention: 534429  
500 Ross Street 154-0520  
Pittsburgh, PA 15262

**Fax:** 844-569-5573



**Questions?** Call us at **1-800-441-7762**, Monday through Friday between 8:00 AM and 6:00 PM ET or visit us online at [www.blackrock.com](http://www.blackrock.com).

**The purpose of this form is** to request a withdrawal from your BlackRock Coverdell ESA and use the proceeds to contribute to a BlackRock CollegeAdvantage<sup>®</sup> 529 account. As long as the 529 account is for the same Designated Beneficiary, the withdrawal is generally considered to be a qualified educational expense for tax purposes. You should consult your tax preparer or financial professional with any other questions on this.

The following instructions will help you complete this form, however if you have any questions we encourage you to call us for assistance at **1-800-441-7762** or email our team at [contact.us@blackrock.com](mailto:contact.us@blackrock.com).

Have questions about the BlackRock CollegeAdvantage<sup>®</sup> 529 Plan? Talk with a 529 Specialist at **1-866-529-8582** to discuss your options prior to completing this form.

### Important Notes:

- ▶ This form is designed to move funds internally at BlackRock only. To request any other type of withdrawal from your ESA, please use the BlackRock Coverdell ESA Withdrawal Form.
- ▶ If you would like to transfer your BlackRock Coverdell ESA to an account in the **iShares 529** plan, please call **1-888-529-9552** to speak with a representative.
- ▶ To use your withdrawal proceeds to open a BlackRock CollegeAdvantage<sup>®</sup> 529 for an immediate family member, you must first move your Coverdell ESA assets to the 529 account, and then use a 529 Change of Beneficiary form to transfer the assets to the family member.
- ▶ Once the Designated Beneficiary attains the legal age in their state of residence, they become the Responsible Individual and must therefore sign. Any instructions signed by the Designated Beneficiary (of age) may require a notary stamp.

### Helpful Information:

The BlackRock CollegeAdvantage<sup>®</sup> 529 plan is the State of Ohio's plan, however as a national 529 plan, it is open to any U.S citizen or resident alien.

Be aware that your state may have its own plan, and not all states tax deduction rules are the same. You should review all of your options prior taking any action.

**Designated Beneficiary reaches Age of Majority**  
Under BNY Mellon's Custodial Agreement, once the Designated Beneficiary is of legal age (18 in most states) he or she becomes the Responsible Individual. Therefore, if the Designated Beneficiary is over age of majority, he or she must sign any written request.

## Section 1: Current Coverdell ESA Information

Please tell us about the account(s) that you wish to withdraw from:

\_\_\_\_\_  
Full name of Responsible Individual

\_\_\_\_\_  
Contact telephone number

\_\_\_\_\_  
Full name of Designated Beneficiary

\_\_\_\_\_  
Contact telephone number

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
BlackRock Account Number(s)

\_\_\_\_\_  
Reference number (if applicable)

## 2. Withdrawal Instructions

You may invest the BlackRock Coverdell ESA withdrawal proceeds into a BlackRock CollegeAdvantage<sup>®</sup> 529 Plan account with the same Beneficiary.

Please process a full withdrawal from all funds in my BlackRock Coverdell ESA (listed above) and:

- Invest the proceeds into my *existing* BlackRock 529 CollegeAdvantage<sup>®</sup> Plan account # \_\_\_\_\_  
Please use allocations below:

Investment Option Name	Class:		Investment Amount	
	A	C		
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	or _____ %
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	or _____ %
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	or _____ %
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	or _____ %

**Total Amount to invest:** \$ \_\_\_\_\_ = 100 %  
*(Must include an estimated amount)*

- OR:**  Invest in my new account - I have attached a BlackRock 529 CollegeAdvantage<sup>®</sup> New Account Application, please invest proceeds using the allocations listed on the application.

## 3. Signatures

The named Responsible Individual must sign for any Designated Beneficiary is not of legal age for the state they reside in (with the exception of Special Needs beneficiaries; you must indicate the Designated Beneficiary qualifies by marking "SN" next to their name below). Under the terms of the BNY Mellon Coverdell ESA custodial agreement, once the Designated Beneficiary attains the legal age in their state of residence, they become the Responsible Individual and must therefore sign. Any instructions signed by the Designated Beneficiary (of age) may require a notary stamp.

### I acknowledge that:

- ▶ I certify that I am authorized to make these elections and that all information provided is true and accurate.
- ▶ I have received, read, and agree to the terms of the BlackRock CollegeAdvantage<sup>®</sup> Program Description and Participation Agreement.
- ▶ I am using my **Reinstatement Privilege** to purchase Class A Units at no upfront sales charge (future contributions in Class A Units may be assessed an upfront sales charge).



\_\_\_\_\_  
Responsible Individual or Designated Beneficiary  
**(Must be of legal age)**

\_\_\_\_\_  
Title / Capacity (if any)

\_\_\_\_\_  
Date (mm/dd/yyyy)

*Place any notary seal or  
Medallion Signature Guarantee  
stamp here*

### For Notary Public:

State of \_\_\_\_\_ County of \_\_\_\_\_

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me,  
the undersigned Notary Public, \_\_\_\_\_,  
personally appeared and proved through satisfactory evidence  
of Identification to be the person whose name is signed above  
and acknowledged by:

\_\_\_\_\_  
Signature of Notary Public

**Not FDIC Insured | May Lose Value | No Bank Guarantee**

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BlackRock CollegeAdvantage

**529 Plan**