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## Rollover Instructions to Current 529 Program Manager or CESA Custodian

### Check One:

#### Full Liquidation.

Rollover ALL assets in my current account to my Bright Directions® College Savings Program Account.

Account Number \_\_\_\_\_

Estimated Value \$ \_\_\_\_\_

#### Partial Liquidation.

Rollover \$ \_\_\_\_\_ from my current account to my Bright Directions® College Savings Program Account.

Account Number \_\_\_\_\_

Your current 529 Program Manager or CESA Custodian must provide the breakdown between contributions and earnings, or the entire rollover will be classified as earnings.

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## Rollover Instructions for the Bright Directions® College Savings Program (if applicable)

THIS IS A ROLLOVER from another qualified tuition program (ie: 529 Plan) or CESA under which you previously paid a front-end sales charge (ie: class A shares) and is directed to be invested in Fee Structure A at NAV in a Bright Directions® College Savings Program Account.

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## Authorize Rollover - You must sign below.

- I hereby authorize and direct the Rollover indicated above and certify that I have read the Program Disclosure Statement and understand the rules and requirements governing rollovers from other 529 plans or CESAs.
- **IMPORTANT => I certify that this Rollover is for the same Beneficiary and that there have been no other rollovers between 529 plans for this Beneficiary in the previous 12 months OR that this Rollover is for a different Beneficiary and the Beneficiary on the Bright Directions® College Savings Program Account is a Member of the Family (as defined in the Program Disclosure Statement) of the Beneficiary on the current 529 plan account I am rolling over.**
- I certify that all the information contained herein is true and correct.
- I acknowledge that the Rollover of funds to the Bright Directions® College Savings Program may have special tax consequences and that neither the Trustee, the Program Manager, nor the Pool will be responsible for the tax consequences of any such Rollover.
- I acknowledge that the Rollover proceeds will be invested according to my current investment election on file with the Bright Directions® College Savings Program for my Account at the time the assets are received.
- By signing below, I authorize the Bright Directions® College Savings Program to inquire into issues relating to the transfer of my account and for the current 529 program manager or CESA custodian to provide information to the Bright Directions® College Savings Program as they may request.

X \_\_\_\_\_

Signature of Account Owner

Date

(Print Name Here) \_\_\_\_\_

The Bright Directions® College Savings Program will send the Account Owner confirmation of the Rollover or Transfer from another 529 plan or CESA custodian once funds are received.

### MEDALLION SIGNATURE GUARANTEE

Note to Guarantor:

Medallion imprints must be fully legible and must not be dated or annotated.

Signature must be stamped with a Medallion Signature Guarantee by a qualified financial institution, such as a commercial bank, savings and loan, U.S. stock broker and security dealer, or credit union, that is participating in an approved Medallion Signature Guarantee Program. (A NOTARY SEAL IS NOT ACCEPTABLE.)