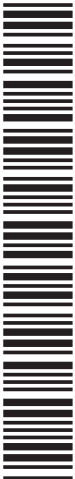


**Instructions:**

- Please complete this form if you will be transferring funds between your TD AMERITRADE 529 College Savings Plan or rolling over funds from another qualified tuition program in to the TD AMERITRADE 529 College Savings Plan.
- Do not use this form for Higher Education Qualified Withdrawals. Use the Withdrawal Request Form if you wish to withdraw money from your account for higher education expenses.
- Only the Account Owner is authorized to transfer funds. Transfers and Rollovers must be made within 60 days of withdrawal.
- A Signature Guarantee is required if you are transferring funds into the TD AMERITRADE 529 College Savings Plan from another qualified tuition program.
- The transfer or rollover of funds may have special tax consequences. Please consult with your tax advisor.

<b>1 ACCOUNT OWNER INFORMATION</b>		
Name (First, Middle Initial, Last):	Social Security Number:	
Address:	Account Number (if available):	
City:	State:	ZIP Code:
Beneficiary Name:	Beneficiary's Social Security Number:	
<b>2 ACTION TO BE TAKEN</b>		
<input type="checkbox"/> <b>Transfer funds</b> between Accounts in the TD AMERITRADE 529 College Savings Plan. The Beneficiary of the Account into which you are transferring funds must be a "Member of the Family" (as defined in the Enrollment Handbook) of the Beneficiary of the Account from which you are transferring funds.		
From Account:	To Account:	
\$ _____ <input type="checkbox"/> Entire Account Balance <input type="checkbox"/> Close Account	Relationship between Beneficiaries on the accounts listed above:	
From Account:	To Account:	
\$ _____ <input type="checkbox"/> Entire Account Balance <input type="checkbox"/> Close Account	Relationship between Beneficiaries on the accounts listed above:	
<input type="checkbox"/> Roll over funds into your TD AMERITRADE 529 College Savings Plan Account from another Qualified 529 Plan. <ul style="list-style-type: none"> <li>• If you do not already have a TD AMERITRADE 529 College Savings Plan, you must complete and return an Enrollment Form with this Transfer Form.</li> <li>• <b>You must provide a statement from the program you are transferring from that shows the earnings and principal portion of the distribution.</b> Without this documentation, the entire amount will be treated as earnings. <b>Signature Guarantee Required.</b> You may also be required to name a new beneficiary (see below).</li> </ul>		
Name of Program and State Sponsor:		
Program's Address:		
City:	State:	ZIP Code:
Account Number of Prior State's Program:	Phone Number:	
Total Dollar Amount of Transfer:	Name of Designated Beneficiary in Prior State's Program*:	
<p><b>*A New Beneficiary is only required if other transfers or rollovers have occurred for the current beneficiary in the past 12 months.</b> A new beneficiary must be a "Member of the Family" (as defined in the Enrollment Handbook). If you need to name a new Beneficiary, please complete and return a Change of Account Owner, Successor, or Beneficiary Form. If this is the first transfer or rollover for the current beneficiary in the past 12 months, the beneficiary may remain the same and you may go to section 3.</p>		



**AUTHORIZATION**

I hereby authorize and direct the Transfers/Rollovers, as defined by the Enrollment Handbook of the TD AMERITRADE 529 College Savings Plan, indicated above. I certify that all the information contained herein is true and correct. I certify that I am the Account Owner on the account(s) listed above. I acknowledge that the Transfer or Rollover of funds in the TD AMERITRADE 529 College Savings Plan may have special tax consequences and that neither TD AMERITRADE, the Program Manager, The Nebraska State Treasurer nor the Nebraska Educational Savings Plan Trust will be responsible for the tax consequences of any such transfer and that I fully understand the consequences of the Transfers or Rollovers under the laws governing the TD AMERITRADE 529 College Savings Plan. I certify this transfer or rollover is being done within 60 days of receipt of the funds. You will receive confirmation of transfer or rollover once it is received. Affix Signature Guarantee for transferring funds from another qualified tuition program.

Signature of Account Owner: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name Here: \_\_\_\_\_

**SIGNATURE GUARANTEE**  
 (Required if transferring funds from another Qualified Tuition Plan).

Please affix Signature Guarantee along with authorized signature, title and date.

A Signature Guarantee is required if you are transferring funds from another state's 529 plan. A Signature Guarantee is a stamped or typed assurance by a financial institution that indicates a signature is valid. It may be obtained at most financial institutions or banks.