

Withdrawals – 529 College Savings Plan

Use this form to make a one-time withdrawal (either full or partial) from a 529 College Savings Plan. Do NOT use this form to transfer assets to another beneficiary. Type on screen or print out and fill in using CAPITAL letters and black ink. If you need more room for information, use a copy of the relevant page.

Helpful to Know

- It is your responsibility to ensure that your withdrawals comply with IRS requirements. Non-qualified withdrawals could trigger IRS fees or penalties. At the end of each tax year, Fidelity will send a 1099-Q to the IRS, and to the participant or beneficiary, reporting any withdrawals. You may want to consult a tax advisor.
- If a 529 plan account was established under the Uniform Gifts to Minors Act or Uniform Transfers to Minors Act (UGMA/UTMA), the account assets belong to the minor/beneficiary and may only be used for the benefit of the minor/beneficiary.
- If you are making withdrawals from more than one 529 plan, you must complete a separate withdrawal form for each account.
- Be aware that the value of your account could change between the time you place your withdrawal request and the time it is processed.
- Note that withdrawals could trigger an early redemption fee (see applicable Fact Kit).

1. Participant (Owner)/ Authorized Individual

Phone numbers will be used if we have questions but will not update your Fidelity contact information.

Name		Social Security or Taxpayer ID Number			
Evening Phone		Daytime Phone		Extension	

2. Beneficiary/ Minor

Name	Social Security or Taxpayer ID Number
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3. Account Number and Request Reason

Account Number

Request Reason

- To pay beneficiary's qualified higher education expenses
- Other

If your distribution request brings your total balance to zero, indicate what you would like us to do.

Account Status if Balance goes to Zero

- Close account
- Leave account open for possible future contributions. Default if no choice indicated.

Form continues on next page. ▶▶

4. Distribution Amount

ALL assets in this account. Any fees will be deducted from the withdrawal amount. **▷ Default if no other information indicated below. ▷ Skip to Section 5.**

Indicate at least one portfolio name. If the amount of your request, plus any fees, is equal to or greater than your portfolio value, we will send only the available balance minus any fees.

ONLY the following amount(s) from the following portfolio(s) Any fees will be deducted from the account, in addition to the withdrawal amount.

Portfolio	Dollar Amount	or <input type="checkbox"/> ALL
	\$	

Portfolio	Dollar Amount	or <input type="checkbox"/> ALL
	\$	

Portfolio	Dollar Amount	or <input type="checkbox"/> ALL
	\$	

Total of Dollar Amounts \$

Reserve Portfolio

Use this to indicate a portfolio we can draw from if one or more of the above portfolios does not contain the dollar amount you have requested on the day we process your withdrawal.

5. Distribution Method

Check ONLY one and provide any required information.

For other distribution options, such as electronic funds transfer (EFT), contact Fidelity.

Check paid to the participant and mailed to the address of record **▷ Default if no choice indicated or if you did indicate a choice but we are unable to process it. To confirm address go to fidelity.com/address.**

Check paid to an institution of higher learning, a beneficiary, or to any payee other than the participant, or mailed to an alternate address:

Alternate Payee/Institution Name		Beneficiary School ID/Account Number	
Address			
City	State/Province	Zip/Postal Code	Country

Transfer to a Fidelity non-retirement account:

Fidelity Non-Retirement Account Number	Fund Name/Number ONLY if Fidelity Funds account.
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If neither the participant nor the beneficiary is an owner of this account, you will need a signature guarantee in Section 6.

Rollover check payable to the following company and plan:

Company/Plan Name		Account/Plan Number	
Address			
City	State/Province	Zip/Postal Code	Country

Bank wire to a bank or credit union account: Fidelity or the bank may charge a fee for wire transfers.

Ask your bank for the correct ABA number.

ABA Number	Bank Name
Checking or Savings Account Number	Checking or Savings Account Owner Name

If the bank or credit union cannot receive wires directly, your wire will have to go through a correspondent bank (which could mean a delay). If this is the case, ask the bank to provide the following information.

Correspondent Routing /Account Number	Correspondent Bank Name
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Form continues on next page. **▶▶**



6. Signature and Date *Participant/Authorized Individual must sign and date.*

By signing below, you:

- Authorize and request Fidelity to withdraw the amount indicated on this form.
- Understand that if this 529 plan account was established as an UGMA/UTMA 529 account, the account assets belong to the minor/beneficiary and may only be used for the benefit of the minor/beneficiary.
- Accept that Fidelity is not responsible for changes in the value of assets that may occur during the distribution process.
- Certify that all information you provided is correct to the best of your knowledge.
- Indemnify the plan and Fidelity, its agents, successors, affiliates, and employees from any liability in the event that you fail to meet the IRS requirements.
- Indemnify the plan and Fidelity, its agents, successors, affiliates, and employees from any liability related to this withdrawal.
- Agree to immediately notify Fidelity in writing if, in the future, you receive a refund related to any previously qualified disbursement.

A Medallion Signature Guarantee is required for any transaction of \$100,000 or more, if requesting bank wire, if sending distribution of 10,000 or more to an alternate payee or address (other than a college/university), or if the address on the account has been changed within the past 15 days. You can get a Medallion Signature Guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a signature guarantee.

	Print Participant/Authorized Individual Name
	Date MM - DD - YYYY
DATE	
	Participant/Authorized Individual Signature
SIGN	

▼ MEDALLION SIGNATURE GUARANTEE ▼

Did you sign the form? Send the ENTIRE form to Fidelity Investments.
Questions? Go to fidelity.com/college or call 1-800-544-1914.

Use postage-paid envelope, drop off at a Fidelity Investor Center OR deliver to:

Regular mail

Fidelity Investments
 Attn: CPSC
 PO Box 770001
 Cincinnati, OH 45277-0015

Overnight mail

Fidelity Investments
 Attn: CPSC
 100 Crosby Parkway KC1K
 Covington, KY 41015

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