

# Fund Transfer Form

(Transfers between CollegeCounts  
529 Fund Accounts)

**CollegeCounts**<sup>SM</sup>  
Alabama's 529 Fund

PO Box 85290  
Lincoln, NE 68501-5290  
CollegeCounts529.com

- Complete this form to transfer funds between your CollegeCounts 529 Fund Accounts.
- A transfer to an Account for another Beneficiary may have federal gift tax or generation-skipping transfer tax consequences. You should consult your tax advisor under such circumstances.
- Return this completed form to:

**Regular Mail:**  
CollegeCounts 529 Fund  
PO Box 85290  
Lincoln, NE 68501-5290

**Overnight Mail:**  
CollegeCounts 529 Fund  
6811 S. 27th Street  
Lincoln, NE 68512

- For assistance, call toll-free: 866.529.2228.

## 1 Account Information

Account Owner's First Name

M.I.

Last Name

Address

City, State, ZIP

Phone

Account Owner's Social Security Number

## 2 Transfer Funds Between CollegeCounts 529 Fund Accounts

From Account

Beneficiary's Name

To Account

Beneficiary's Name

\$

Amount to Transfer

Relationship between Beneficiaries on the Accounts listed above  
(brother, sister, first cousin, etc.)

Entire Balance  Close Account

## 3 Authorization

I certify that all of the information contained herein is true and correct. I direct the CollegeCounts 529 Fund to make the transfer that I have indicated above. I understand that a transfer to an Account for another Designated Beneficiary may have tax consequences, and I assume full responsibility for any tax consequences.

X \_\_\_\_\_  
Signature of Account Owner

\_\_\_\_\_ Date



Offered by the  
State of Alabama

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Program Manager

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