

Investment Option Name	Indicate the Incoming Amount <i>(in dollars OR percentage)</i>							Is this a new Investment Option?	
	Dollars				Percentage				
Managed Allocation Option	\$			,			.	.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Active Equity Option (1970)	\$			,			.	.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Equity Index Option (1969)	\$			,			.	.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Balanced Option (2006)	\$			,			.	.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Fixed Income Option (1971)	\$			,			.	.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Guaranteed Option (1819)	\$			,			.	.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Total INCOMING Amount	\$			,			.	100.00%	

6 Signature and Authorization *(This section must be signed for this change to take effect.)*

By signing this form, I authorize the transfer of my Account to another Account Owner and/or Beneficiary and acknowledge the following:

- I certify that all of the information provided by me on this *Form* is, and all information provided by me in the future will be, true, complete and correct.
- If changing the Account Owner, the new Account Owner will submit an *Account Application* along with this Form, unless he/she already maintains an Account for the Beneficiary.
- If changing the Beneficiary, I agree to the same representations, warranties, and agreements for my new Beneficiary as were stated in the original *Account Application* for my current Beneficiary and I certify that the new Beneficiary is a “member of the family” of the current Beneficiary, as defined in Section 529 of the Internal Revenue Code.
- If I am participating in the Automatic Contribution Plan (ACP), I understand that my participation in ACP will be cancelled only if I transfer my entire Account to a new Account owner and/or Beneficiary; otherwise my ACP contributions will continue in my original Account unless an *Electronic Banking Information Form* accompanies this form.
- If I am making contributions by payroll deduction, I understand that my payroll contributions will continue into this Account, regardless of the amount transferred, unless I notify my employer that I want to stop or change the amount of my payroll deduction, or unless an updated *Payroll Deduction Form* accompanies this form to reallocate payroll contributions among my Account(s) for different Beneficiaries, if any.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner. (If I am an authorized representative of the Account Owner, including an Entity Account Owner, either a Medallion Signature Guarantee stamp or a Signature Validation Program (SVP) Stamp appears on this form, as described below.¹) If I am transferring my entire account balance, I request the cancellation of my *Participation Agreement* and the closure of my Account.

Signature of Account Owner, Custodian or Authorized Representative of an Individual or Entity Account Owner

Date

IMPORTANT INFORMATION

If you are **changing the Account Owner**, a Medallion Signature Guarantee (MSG) stamp is required for all Entity Accounts and may be required if you are the Authorized Representative of an Individual Account. Unless a MSG stamp appears below, any change of Account Owner or Beneficiary will result in a 30-day hold on withdrawals. If you are **changing the Beneficiary**, a Signature Validation Program (SVP) Stamp is required for all Entity Accounts and may be required if you are the Authorized Representative of an Individual Account.

You may be required to provide proof of your authority to act on behalf of this Account to your bank or broker before a MSG or SVP stamp will be affixed to this form.

Note: The SVP stamp is not required if a Plan Power of Attorney Form is on file for an Individual Account, or if a Plan Power of Attorney Form accompanies this form.

AFFIX STAMP HERE

Mail this form to:

Kentucky Education Savings Plan Trust
P.O. Box 8100
Boston, MA 02266-8100



Program Administration by TIAA-CREF Tuition Financing, Inc.
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