



**Mississippi Affordable College Savings
MACS Program**

Incoming Rollover Form

Questions? Call toll-free 1-800-486-3670
P.O. Box 55037, Boston, MA 02205-5037
Visit www.MS529.com

Instructions

- Complete this form to initiate a direct rollover of assets from another 529 plan to an existing account in *Mississippi Affordable College Savings*, or *MACS*. Note: If you have not already opened a MACS account, please enclose a completed application with this form.
- Your rollover proceeds will be invested according to the instructions provided below at the time the proceeds are received.
- Print in capital letters using blue or black ink. Mail the original form to: Mississippi Affordable College Savings (MACS), P.O. Box 55037 Boston, MA 02205-5037.
- Your current 529 plan provider may request additional paperwork, may assess a fee, or require a Medallion Signature Guarantee¹ to complete your request for a rollover. To avoid delays, contact your current Qualified Tuition Program for instructions before mailing this form to the *Plan*.
- Forms may be downloaded at www.MS529.com or you may call MACS toll-free at 1-800-486-3670 to order forms, perform certain account transactions, or to get help completing a form.

1 MACS Account Information

| | |
|---|---|
| <input style="width:90%; height: 20px;" type="text"/> | <input style="width:90%; height: 20px;" type="text"/> |
| Investment Option and MACS Account Number (Leave blank for a new MACS Account.) | Account Owner Social Security or Taxpayer Identification Number |
| <input style="width:100%; height: 20px;" type="text"/> | |
| Account Owner Name (First, MI, Last, Suffix or Name of Entity) | |
| <input style="width:100%; height: 20px;" type="text"/> | |
| Beneficiary Name (First, MI, Last, Suffix) | |
| <input style="width:100%; height: 20px;" type="text"/> | |

2 Contribution Instructions Select your Investment Option(s) below and indicate if your rollover will be deposited into a new option or into one you already own.

| Investment Options <i>(\$25 minimum per Option)</i> | Select your Investment Options | | |
|--|--------------------------------|----------------|---|
| | Provide amount (\$ or %) | New option? | |
| Managed Allocation Option (Age-based) | \$ | .00% | <input type="checkbox"/> Yes OR <input type="checkbox"/> No |
| Diversified Equity Option (1968) | \$ | .00% | <input type="checkbox"/> Yes OR <input type="checkbox"/> No |
| Fixed Income Option (2823) | \$ | .00% | <input type="checkbox"/> Yes OR <input type="checkbox"/> No |
| Guaranteed Option (1967) | \$ | .00% | <input type="checkbox"/> Yes OR <input type="checkbox"/> No |
| Aggressive Allocation Option (2283) | \$ | .00% | <input type="checkbox"/> Yes OR <input type="checkbox"/> No |
| Moderate Allocation Option (2284) | \$ | .00% | <input type="checkbox"/> Yes OR <input type="checkbox"/> No |
| Conservative Allocation Option (2285) | \$ | .00% | <input type="checkbox"/> Yes OR <input type="checkbox"/> No |
| TOTAL ROLLOVER AMOUNT | \$ | 100.00% | |

3 Your Current 529 Plan Account Information

The Account Owner and Social Security number, or Individual Taxpayer ID number, must be the same on the account from which you are transferring assets **as on your MACS account**.

| | |
|--|---|
| <input style="width:90%; height: 20px;" type="text"/> | <input style="width:90%; height: 20px;" type="text"/> |
| Account Number (This is the Account from which you are transferring assets.) | Account Owner Social Security or Taxpayer Identification Number |
| <input style="width:100%; height: 20px;" type="text"/> | |
| Account Owner Name (First, MI, Last) | |
| <input style="width:100%; height: 20px;" type="text"/> | |
| Beneficiary Name (First, MI, Last) | |
| <input style="width:100%; height: 20px;" type="text"/> | |

¹ Medallion Signature Guarantees and Signature Validation Program (SVP) Stamps are available from banks or trust companies, savings banks, savings and loan associations or members of a national stock exchange and warrants that the signer of this form is the appropriate person to provide instruction for this account. A notary public **cannot** provide a Medallion Signature Guarantee or a Signature Validation Program (SVP) Stamp. Please contact your bank or broker, if needed.

