



Mississippi Affordable College Savings MACS Direct Program Rollover Form (for New or Existing Accounts)

Use this form to rollover funds into the Program
Questions? Call toll-free 1-800-486-3670
P.O. Box 55037, Boston, MA 02205-8683
Visit www.collegesavingsMS.com

Instructions

- Read the Program *Disclosure Booklet* for complete rollover information before completing this form.
- Complete a separate form for each rollover account and submit a new *Account Application* along with this form, unless you already have a *Mississippi Affordable College Savings (MACS) Account* for this Beneficiary.
- Your current Qualified Tuition Program may require a medallion signature guarantee¹ on this form, or it may have additional requirements before releasing your funds. To avoid delays, please call your current Qualified Tuition Program for instructions before mailing this form to *MACS*.
- Unless the Program receives a breakdown of earnings and contributions for your original account, the entire rollover amount will be treated as earnings and will be reported as earnings upon withdrawal.
- Print in capital letters with blue or black ink, sign and date the form and mail it to the Program at the above address.

1 Type of Rollover *(Check only one box.)*

- Direct Rollover from another Qualified Tuition Program (QTP) or from the Mississippi Prepaid Affordable College Savings Plan**
We will request a transfer of funds on your behalf directly from your current QTP into your MACS Account but you should verify whether your current program has any additional requirements before you submit this form to MACS.
- Indirect Rollover from another Qualified Tuition Program (QTP) or from a Coverdell Education Savings Account, or from the Mississippi Prepaid Affordable College Savings Plan**
Your check must be payable to *Mississippi Affordable College Savings* and must be received by the MACS within 60 days of the date of withdrawal from the other account to qualify for rollover treatment.

2 MACS Program Account Information *(This is your new or existing MACS Account.)*

You can rollover assets, either directly or indirectly, into a MACS Account for the same Beneficiary or into a MACS Account for another Beneficiary who is a "member of the family" of the original Beneficiary, as described in the *Disclosure Booklet*. However, funds that were previously on deposit in a custodial account under the Uniform Gifts to Minors Act (UGMA) or Uniform Transfers to Minors Act (UTMA) can only be deposited into an UGMA/UTMA account for the same Beneficiary within MACS.

Who is the MACS Beneficiary?	<input type="checkbox"/> Same Beneficiary	<input type="checkbox"/> New Beneficiary , excluding Custodial (UGMA/UTMA)
Type of Account: <i>(Check only one.)</i>	<input type="checkbox"/> Individual	<input type="checkbox"/> Custodial (UGMA/UTMA) <input type="checkbox"/> Entity

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<i>Fund and Program Account Number (Leave blank for a new MACS Account.)</i>	<i>Social Security or Taxpayer Identification Number</i>

<i>Account Owner Name (First, MI, Last, Suffix or Name of Entity)</i>

<i>Beneficiary Name (First, MI, Last, Suffix)</i>

3 Contribution Instructions *(Your funds may be deposited to any one or more of the following Investment Options.)*

Please indicate whether your contribution will be deposited into a new Investment 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	\$.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
100% Equity Option (1968)	\$.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
Guaranteed Option (1967)	\$.00%	<input type="checkbox"/> Yes OR <input type="checkbox"/> No
TOTAL ROLLOVER CONTRIBUTION AMOUNT	\$	100.00%	

¹ Certain commercial banks, trust companies, savings associations, credit unions and members of the United States stock exchange participate in the medallion signature guarantee program. A notary public **cannot** provide a medallion signature guarantee. Please contact your bank or broker, if needed.

