

### Important information about this form:

- Fill out this form to contribute money to an ABLE for ALL Savings Plan account with a check.
- You may only contribute to an existing account. Use an **Enrollment Form** (or sign up online at [www.ABLEforALL.com](http://www.ABLEforALL.com)) if you don't have an account.
- Include a check with the amount you'd like to add, and make it payable to ABLE for ALL Savings Plan.
- There's a minimum contribution of at least \$10 each time and a yearly standard contribution limit of \$15,000.
- If you're making an ABLE to Work contribution, you may contribute an amount equal to the Beneficiary's gross income, up to \$12,060, in addition to the yearly standard contribution limit.
- Type or print clearly in black ink, and do not staple the check.
- Future contributions and withdrawals will be allocated to help bring your account to your target allocation of cash and investment balances.
- Please note, once your funds have been allocated there is a 15-day hold period where you will not be able to withdraw these funds.

### Need help?

Give us a call Monday – Friday  
from 9am – 8pm ET at  
**1-844-394-2253** or  
**1-844-888-2253 (TTY)**

### Mail the form to:

ABLE for ALL Savings Plan  
P.O. Box 9891  
Providence, RI 02940-8091

### Overnight Mail:

ABLE for ALL Savings Plan  
4400 Computer Drive  
Westborough, MA 01581

## 1 ABLE account information

\_\_\_\_\_  
Name of the Beneficiary on the ABLE account (First and last)

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_  
Beneficiary's Social Security or Taxpayer Identification Number

\_\_\_\_\_  
ABLE for ALL Savings Plan account number

## 2 Tell us how much you want to contribute

**Make the check payable to ABLE for ALL Savings Plan with the same amount written below**

\$ \_\_\_\_\_

\_\_\_\_\_  
Contribution amount (Minimum \$10, maximum \$15,000)

### 3 Contribution type

Which type of contribution are you making? (Please select one)

- Standard contribution  
\$15,000 yearly standard contribution limit.
  
- ABLE to Work contribution  
If the Beneficiary is earning wages, they may contribute an amount equal to their gross income, up to \$12,060, in addition to the yearly standard contribution limit.

### 4 Sign the form — If applicable

**Only sign if you're making an ABLE to Work contribution.**

By signing below, if I'm making an ABLE to Work contribution, I certify that:

- The Beneficiary is earning wages.
- The amount being contributed is less than or equal to the Beneficiary's gross income this calendar year and is no more than \$12,060.
- The Beneficiary (or the Beneficiary's employer) has not contributed to a defined contribution plan (401K), annuity plan (403(b)), or deferred compensation plan (457(b)) this calendar year.

\_\_\_\_\_  
Signature of Beneficiary or Authorized Legal Representative

\_\_\_\_\_  
Date (mm/dd/yyyy)