

Important information about this form:

- Fill out this form to setup, remove, or replace recurring monthly withdrawals to your ABLE account.
- You must have an open account to use this form. If you need to sign up, go online to www.ABLEforALL.com or use an **Enrollment Form** before completing this form.
- We are required to file an IRS Form 1099-QA when you make a withdrawal from your account.
- Withdrawals may have tax consequences depending on how the distribution is used. You should consult your tax advisor.
- Keep any receipts for eligible expenses once the money from this account is used.
- Make sure you use black ink. Type or print clearly in capital letters.

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

Want to do this quicker?

Sign in to create or manage your monthly withdrawals online.

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 Instructions

- Stop all monthly withdrawals from this account (Skip to **Step 5**)
- Replace all monthly withdrawals from this account (Complete **Steps 3, 4, and 5**)
- Create a new monthly withdrawal from this account (Complete **Steps 3, 4, and 5**)

3 Monthly withdrawal setup

Tell us how much you want to withdraw from your account each month.

\$ _____
 Amount (Must be at least \$10)

____ - ____
 Withdrawal Day (1 – 28)*
 If you don't pick a date, we'll automatically deduct your withdrawal on the 1st of every month.

4 Bank account information

Attach a voided check or copy of your bank statement showing the name, address, last 4 digits of the account number and complete the bank information below. (Please do not staple, use a paper clip for the check).

What type of document are you including to verify this bank account? Voided check Bank statement

Bank account type Checking Savings

 Name on bank account
 The first and last name on the bank account needs to be the same as either the Beneficiary or the Authorized Legal Representative.

 Bank name

 Bank routing number

 Bank account number

Need help?
 You can find your bank information on the bottom of one of your checks here:

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 Routing Number Account Number

* A note on when withdrawals will be deducted from your account: If the Withdrawal Day you've selected falls on a regular business day, your withdrawal will be deducted from your account two business days prior to the Withdrawal Day. If the Withdrawal Day you've selected falls on a weekend or a holiday, the withdrawal will be deducted from your ABLE account on the next Business Day. The withdrawn amount should reach your bank account within 2–5 business days.

5 Sign the form

By signing this form, you're confirming that the information provided is accurate, and true and that you agree and certify that:

- If I selected Stop all monthly withdrawals to this account, or Replace all monthly withdrawals to this account:
 - I understand that all currently active monthly withdrawals to this account will be cancelled.
 - I understand that my request will become effective once processed by the Plan and that the Plan must receive my request at least 1 business day before I want it to become effective.
- If I selected Create a new monthly withdrawal to this account, or Replace all monthly withdrawals to this account:
 - I understand this authorizes the Plan to initiate recurring withdrawals from my ABLÉ for ALL account to my bank account on the Withdrawal Day each month for the total withdrawal amount.*
 - I understand that if there is not enough money in my account to complete the recurring withdrawal or if the withdrawal amount is greater than 90% of my account balance, it will fail.
 - I may cancel these recurring monthly withdrawals by using this form.

Signature of Beneficiary or Authorized Legal Representative

Date (mm/dd/yyyy)

* A note on when withdrawals will be deducted from your account: If the Withdrawal Day you've selected falls on a regular business day, your withdrawal will be deducted from your account two business days prior to the Withdrawal Day. If the Withdrawal Day you've selected falls on a weekend or a holiday, the withdrawal will be deducted from your ABLÉ account on the next Business Day. The withdrawn amount should reach your bank account within 2–5 business days.