

## Important information about this form:

- Fill out this form to set up, 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](http://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 if they're used for unqualified expenses. You should consult your tax advisor.
- If you recently changed your banking information, there will be a 10-day hold period for check withdrawals. If you recently updated your address, there will be a 15-day hold period for check withdrawals. With a notarization acknowledgement (**Step 9** of this form) you can bypass the hold periods.
- A notarization acknowledgement (**Step 9** of this form) is required for monthly withdrawals over \$50,000 or any withdrawals to 3rd parties.
- 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**

Individuals with speech or hearing disabilities may dial 711 to access Telecommunications Relay Service (TRS) from a telephone or TTY.

## Mail the form to:

ABLE for ALL Savings Plan  
PO Box 534430  
Pittsburgh, PA 15253- 4430

## Overnight Mail:

ABLE for ALL Savings Plan  
Attention: 534430  
500 Ross Street, 154-0520  
Pittsburgh, PA 15262

## Fax:

833-286-8167

## 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 8**)
- Replace all monthly withdrawals from this account (Complete **Steps 3–8**)
- Create a new monthly withdrawal from this account (Complete **Steps 3–7**)

### 3 Monthly withdrawal set up

Tell us when you want to withdraw money from your account each month.

\_\_\_\_

Withdrawal Day (1 – 28)\*

If you don't pick a date, we'll automatically deduct your withdrawal on the 1st of every month.

### 4 Choose the type of withdrawal

Direct deposit into the bank account connected to this account (Fill out **Step 5** and **8**)  
If there is more than one bank account connected to the account, you'll have to select which bank you want to receive the deposit. There will be a 30-day hold if there was a recent change to the banking information.

A check sent to the mailing address on the account (Fill out **Step 8**)  
There will be a 30-day hold period for check withdrawals if you recently changed the mailing address.  
Please note: There is a \$2.50 fee for withdrawals issued via check.

Who should we make the check out to?       Beneficiary       Authorized Legal Representative

A check sent to a third party (Fill out **Steps 6, 7** and **8**)  
Please note: There is a \$2.50 fee for withdrawals issued by check.

\* 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 account on the next Business Day. The withdrawn amount should reach your bank account within 2–5 business days.

## 5 Select a withdrawal option

There are risks involved in investing. Your decision should be based on your goals and timeline for this ABLE account. The rest is determined by the market's performance.

For an in-depth look at each of the options, please refer to the **Plan Disclosure Booklet**.

Choose withdrawal option (Please select at least one)

ABLE Conservative

A predesigned diversified option with a mix of stocks and bonds for a more conservative risk profile.

\$ \_\_\_\_ , \_\_\_\_ . \_\_\_\_  
Amount

ABLE Moderate

A predesigned diversified option with a mix of stocks and bonds for a more moderate risk profile.

\$ \_\_\_\_ , \_\_\_\_ . \_\_\_\_  
Amount

ABLE Aggressive

A predesigned diversified option with a mix of stocks and bonds for a more aggressive risk profile.

\$ \_\_\_\_ , \_\_\_\_ . \_\_\_\_  
Amount

Cash Option

This fund offers FDIC insurance protection for amounts contributed up to FDIC-permitted limits.

\$ \_\_\_\_ , \_\_\_\_ . \_\_\_\_  
Amount

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\$ \_\_\_\_ , \_\_\_\_ . \_\_\_\_  
Total withdrawal amount

## 6 Bank account information for withdrawals to a checking or savings account

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:

⑆000000000⑆ 0000000000001 1000

Routing  
Number

Account  
Number

## 7 Third-party information

Payable to

Contact name

Memo line

### Mailing address

Street address 1

Street address 2

City

State

ZIP Code

## 8 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** from this account, or **Replace all monthly withdrawals** from this account:
  - I understand that all currently active monthly withdrawals from 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** from this account, or **Replace all monthly withdrawals** from this account:
  - I understand this authorizes the Plan to initiate recurring withdrawals from my ABLE for ALL account and to either: (i) make recurring deposits to my bank account; (ii) send checks to my address; or (iii) send checks to a third party 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 95% of my investment fund(s) account balance, it will fail.
  - I may cancel these recurring monthly withdrawals by using this form.

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Signature of Beneficiary or Authorized Legal Representative

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Date (mm/dd/yyyy)

**9 A notarization acknowledgement is required for a withdrawal over \$50,000 or any withdrawals to 3rd parties.**

**Keep in mind that:**

- You're providing the following information as underwritten certification that your signature is genuine.
- You cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the ABLÉ account.

**Only sign if you are in the presence of a notary public or other officer providing notarization.**

The undersigned has read the foregoing in its entirety before signing. IN WITNESS WHEREOF, I have hereunto

set my hand this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Day (#) Month Year

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

State of \_\_\_\_\_, County of \_\_\_\_\_

This instrument was acknowledged before me

physical presence  online notarization

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

by \_\_\_\_\_  
Name of person (First and last)

My term expires: \_\_\_\_\_  
Date (mm/dd/yyyy)

**Notary Public (Seal)**

\_\_\_\_\_  
Signature of Notary Public