

Use this form to request a one-time withdrawal from a BlackRock Coverdell Education Savings Account (“Coverdell ESA”) and use the proceeds to fund a BlackRock CollegeAdvantage® 529 account.

- ▶ Any withdrawal from your account may be reported to the IRS
- ▶ Withdrawal requests in excess of \$100,000 for Investor Shares require a Medallion Signature Guarantee stamp

Send this form, along with any other required documents, to:


▶ **Regular mail:**

BlackRock Funds
P.O. Box 9819
Providence, RI 02940

▶ **Overnight mail:**

BlackRock Funds
4400 Computer Drive
Westborough, MA 01581

Fax: (508) 599-6054

 **Questions?** Call us at **1-800-441-7762**, Monday through Friday between 8:00 AM and 6:00 PM ET or visit us online at www.blackrock.com.

The purpose of this form is to request a withdrawal from your BlackRock Coverdell ESA and use the proceeds to contribute to a BlackRock CollegeAdvantage® 529 account. As long as the 529 account is for the same Designated Beneficiary, the withdrawal is generally considered to be a qualified educational expense for tax purposes. You should consult your tax preparer or financial advisor with any other questions on this.

The following instructions will help you complete this form, however if you have any questions we encourage you to call us for assistance at **1-800-441-7762** or email our team at contact.us@blackrock.com.

Have questions about the BlackRock CollegeAdvantage® 529 Plan? Talk with a 529 Specialist at **1-866-529-8582** to discuss your options prior to completing this form.

Important Notes:

- ▶ This form is designed to move funds internally at BlackRock only. To request any other type of withdrawal from your Coverdell ESA, please use the BlackRock Coverdell ESA Withdrawal Form.
- ▶ If you would like to transfer your BlackRock Coverdell ESA to an account in the **iShares 529** plan, please call **1-888-529-9552** to speak with a representative.
- ▶ To use your withdrawal proceeds to open a BlackRock CollegeAdvantage® 529 for an immediate family member, you must first move your Coverdell ESA assets to the 529 account, and then use a 529 Change of Beneficiary form to transfer the assets to the family member.
- ▶ In **Section 3** signatures, the responsible individual must sign for BlackRock to process this form

Helpful Information:

The BlackRock CollegeAdvantage® 529 plan is the State of Ohio’s plan, however as a national 529 plan, it is open to any U.S citizen or resident alien.

Be aware that your state may have its own plan, and not all states tax deduction rules are the same. You should review all of your options prior taking any action.

Section 1: Current Coverdell ESA Information

Please tell us about the account(s) that you wish to withdraw from:

Full name of Responsible Individual

Contact telephone number

Full name of Designated Beneficiary

Contact telephone number

Social Security Number

BlackRock Account Number(s)

Reference number (if applicable)

2. Withdrawal Instructions

You may invest the BlackRock Coverdell ESA withdrawal proceeds into a BlackRock CollegeAdvantage[®] 529 Plan account with the same Beneficiary.

Please process a full withdrawal from all funds in my BlackRock Coverdell ESA (listed above) and:

- Invest the proceeds into my *existing* BlackRock 529 CollegeAdvantage[®] Plan account # _____
Please use allocations below:

Investment Option Name	Class:		Investment Amount
	A	C	
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____ or _____ %
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____ or _____ %
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____ or _____ %
_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____ or _____ %

Total Amount to invest: \$ _____ = 100 %
(Must include an estimated amount)

- OR:** Invest in my new account - I have attached a BlackRock 529 CollegeAdvantage[®] New Account Application, please invest proceeds using the allocations listed on the application.

3. Signatures

The named Responsible Individual must sign for any Designated Beneficiary is not of legal age for the state they reside in (with the exception of Special Needs beneficiaries; you must indicate the Designated Beneficiary qualifies by marking "SN" next to their name below). Under the terms of the BNY Mellon Coverdell ESA custodial agreement, once the Designated Beneficiary attains the legal age in their state of residence, they become the Responsible Individual and must therefore sign. Any instructions signed by the Designated Beneficiary (of age) may require a notary stamp.

I acknowledge that:

- ▶ I certify that I am authorized to make these elections and that all information provided is true and accurate.
- ▶ I have received, read, and agree to the terms of the BlackRock CollegeAdvantage[®] Program Description and Participation Agreement.
- ▶ I am using my **Reinstatement Privilege** to purchase Class A Units at no upfront sales charge (future contributions in Class A Units may be assessed an upfront sales charge).



Signature of Responsible Individual

Title / Capacity (if any)

Date (mm/dd/yyyy)

*Place any notary seal or
Medallion Signature Guarantee
stamp here*

For Notary Public:

State of _____ County of _____

On this _____ day of _____, 20____, before me,
the undersigned Notary Public, _____,
personally appeared and proved through satisfactory
evidence of Identification to be the person whose name is
signed above and acknowledged by:

Signature of Notary Public

Not FDIC Insured | May Lose Value | No Bank Guarantee

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BlackRock CollegeAdvantage

529 Plan

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