

# Maryland Prepaid College Trust Refund Request Form

**✓ Use this form to:**

Request a Refund or Reduced Refund

Prior to completing this form, you should review details on Refunds and Reduced Refunds that are contained in the Contract in Article VI – Termination, Transfer and Refund and the Schedule of Fees. Also, please review the Certain Federal Tax Considerations and Certain State Tax Considerations sections in the Prepaid College Trust Disclosure Statement.

**Mail to:**

Maryland Prepaid College Trust  
217 E. Redwood Street, Suite 1350  
Baltimore, MD 21202

-  This stamp indicates a Medallion Signature Guarantee is required.
-  This paper clip indicates you may need to attach documentation.

**Print or type all information except your signature. Original signature is required.**

## 1 Account Information

Account Holder (Trust name if applicable)	Social Security/Tax ID Number
Custodian or Trustee (if applicable)	
Beneficiary	Account Number

## 2 Reason for Refund (check one)

Death or Disability of the Beneficiary  
 Please attach required documentation

Reduced Refund (all other circumstances).

Indicate below whether you are requesting a Reduced Refund for all or part of your Account.

\_\_\_ 100% of my account

\_\_\_ Part of my account for {choose one}

\_\_\_\_\_ semester(s) or \_\_\_\_\_ year(s)

\$ \_\_\_\_\_ dollar amount

## 3 Payee Option

The refund will be issued to the individual selected below. The Payee's Social Security Number (SSN) will be used for tax reporting purposes.

Please select a payee option:

Account Holder       Beneficiary

## 4 Signature

4A Account Holder, Custodian, or Trustee

4A Account Holder, Custodian, or Trustee (cont.)

By signing below, I, the Account Holder or Custodian, acting on behalf of a minor Account Holder, do hereby authorize this refund or reduced refund and certify that all information provided is accurate and true.

- If I am withdrawing my entire Account balance, I understand that my Account will be closed.
- I certify that my signature on this form is genuine.
- I agree to indemnify and hold harmless Maryland 529 and the Prepaid College Trust for any claims arising as a result of untrue or inaccurate information supplied by me.
- **I understand that it is my responsibility to maintain accurate records as may be required by the Internal Revenue Service to substantiate this refund or reduced refund for tax purposes.**

### SIGNATURE AND DATE REQUIRED

Account Holder or Custodian (if Account Holder is a minor) or Trustee(s)      Date (mm/dd/yyyy)

**X**

4B Medallion Signature Guarantee 

You can obtain the Medallion Signature Guarantee from most banks, savings institutions, or broker-dealers. We cannot accept guarantees from notaries public or non-Medallion guarantors. The level of coverage provided by the guarantor's stamp must cover the dollar amount of the transaction, or it may be rejected.

### MEDALLION SIGNATURE GUARANTEE

Place Medallion Stamp Below:	Name of Institution
	Print Name of Person Providing Guarantee
	Date (mm/dd/yyyy)