

Rollover

✓ Use this form to:

- Roll over between Maryland College Investment Plan (MCIP) and Maryland Prepaid College Trust (MPCT).
- Roll over from a different 529 plan to an MCIP or MPCT Account.

 This paper clip indicates you may need to attach documentation.

If moving assets to the Prepaid College Trust:

Maryland Prepaid College Trust
P.O. Box 17591
Baltimore, MD 21297-1591

If moving assets to the College Investment Plan:

Maryland College Investment Plan
P.O. Box 17479
Baltimore, MD 21297-1479

 This stamp indicates a signature guarantee is required.

1 Maryland 529

A Receiving Account Information

The Account Holder on either the MCIP or MPCT Account must be the same as the Account Holder on the account that is being rolled over. Assets can be rolled over between 529 plans for the same Beneficiary once every 12 months. If the Beneficiary changes, there is no limit on rollovers between 529 plans.

Account Holder	Social Security Number
Custodian (if applicable)	
Beneficiary	Social Security Number
Relationship to Beneficiary* (if Beneficiary is to be different from the Account being rolled over)	

***NOTE:** Must be a Member of the Family of the Beneficiary in the account being rolled over as described in the Plan Disclosure Statement.

B Plan Selection

If the Account Holder does not have an Account for the Beneficiary in Section 1A, a [New Account Enrollment](#) form is required.  Visit Maryland529.com to set up a new account or call to obtain the correct form.

Check all that apply:

- Maryland Prepaid College Trust.** The amount below cannot be more than the remaining balance on your Account.

\$	or	%
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- Maryland College Investment Plan**

Portfolio Name	Account Number
<input type="checkbox"/> Full Amount <input type="checkbox"/> Partial Amount: % or \$	

- For more Accounts, check this box and attach a [separate page](#). 

2 Account to Be Rolled Over

Attach a copy of your current statement from your 529 plan.  Contact your current 529 plan to determine if there are any additional requirements to process your rollover.

Your current 529 plan must provide the division between contributions (principal) and earnings, or the entire rollover must be classified as earnings.

529 Plan Name		Phone
Address		
City	State	ZIP Code
Account Holder		Social Security Number
Day Phone	Evening Phone	
Beneficiary		Social Security Number
Custodian (if applicable)		
Account Number or Portfolio Name		
<input type="checkbox"/> Full Liquidation <input type="checkbox"/> Partial Liquidation: % or \$		

- For more Accounts, check this box and attach a [separate page](#). 

3 Signature

A Account Holder, Custodian, or Trustee Signature

B Signature Guarantor 

By signing this form, I understand and hereby certify that:

- If this rollover is for the same Beneficiary, there have been no other rollovers between 529 plans for this Beneficiary in the previous 12 months. If this rollover is for a different Beneficiary, the Beneficiary on my Maryland 529 Account(s) that is receiving the rollover is a Member of the Family (as defined in the Maryland 529 current enrollment kit) of the Beneficiary on the current 529 plan Account I am rolling over.
- I hereby authorize this rollover and acknowledge that if my current 529 plan or I fail to provide the applicable earnings, the entire rollover contribution will be treated as earnings.
- I agree to indemnify and hold harmless Maryland 529, MCIP, and MPCT for any claims arising as a result of untrue or inaccurate information supplied by me.

A signature guarantee is required if:

- Your current 529 plan requires it to process the rollover. If a signature guarantee is required, you must sign this form in the presence of a guarantor who is a participant in the Medallion signature guarantee program. You can obtain the Medallion signature guarantee from most banks, savings institutions or broker-dealers. We cannot accept guarantees from other guarantors or from notaries public or organizations, which do not provide reimbursement in the case of fraud as would a Medallion signature guarantor. When obtaining a Medallion signature guarantee, please discuss with the guarantor the dollar amount of your proposed transaction. It is important that the level of coverage provided by the guarantor's stamp covers the dollar amount of the transaction or it may be rejected.

SIGNATURE AND DATE REQUIRED

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

X

Print Name _____

MEDALLION SIGNATURE GUARANTEE

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

Official Use Only—Letter of Acceptance/Payment Instructions

Payment Instructions to Current 529 Plan

We maintain a Qualified Tuition Program Account under Section 529 for the Account Holder and will place the rolled over assets into the Account for the Account Holder and Beneficiary identified in Section 1.

Authorized Signature, T. Rowe Price _____ Date (mm/dd/yyyy) _____

X

Title _____

Earnings*	\$
Principal*	\$
Total Rollover	\$

***NOTE:** You must provide the earnings applicable to the rollover and the principal. If left blank, the entire contribution will be treated as earnings.

If moving assets to the Maryland Prepaid College Trust:

Make check payable to: Maryland Prepaid College Trust:

Name
Tracking Number

And mail to: **Maryland Prepaid College Trust**, P.O. Box 17591, Baltimore, MD 21297-1591

If moving assets to the Maryland College Investment Plan:

Make check payable to: Maryland College Investment Plan:

Name
Tracking Number

And mail to: **Maryland College Investment Plan**, P.O. Box 17479, Baltimore, MD 21297-1479

Express delivery: **Maryland College Investment Plan**, Mail Code: 17479, 4515 Painters Mill Road, Owings Mills, MD 21117-4903