

West Virginia Prepaid Tuition Plan Distribution Request Form Instructions

Distribution Request Forms required to access semester benefits

In all cases, the Account Owner must submit a Distribution Request Form in order to obtain the semester's Prepaid Tuition Plan benefit. The distribution check may be made payable to the Account Owner, the Beneficiary, or to an Eligible Higher Education Institution. Distribution checks will be mailed to the Account Owner at the address on file with the Plan unless the Account Owner directs otherwise.

Benefit availability

Prepaid Tuition Plan benefits are available on a semester-by-semester basis, two per academic year, beginning with the fall semester of the beneficiary's expected college entrance year. **Example** - if you own eight semester units of prepaid tuition, they mature two per academic year, for four years. The *academic year* is the typical West Virginia public college academic year that begins with the fall term and runs through the end of the summer session. If you have not depleted all your available units for fall and spring semesters, the remaining units may be used for summer school classes. The SMART529 WV Prepaid Tuition Plan maintains the official record of available units in each Prepaid Tuition Plan account.

Distribution schedule

Distribution of benefits maturing for the fall semester begins in July. Spring semester benefits are available in November. Distribution Request Forms should normally be submitted two weeks prior to your need of the funds to allow time for mailing & processing.

If you have questions, please contact the SMART529 WV Prepaid Tuition Plan at 1-866-574-3542.

Section by Section Form Instructions

Top Section. Fill in the information requested in each space.

Section A

1. Check whether you wish to withdraw the full semester value or other amount. Most commonly, people withdraw the full semester's benefit value. If you wish to withdraw less than the full semester value, fill in that amount. (You may be limited to withdrawing no more than the current semester's unit value.)
2. Check the term enrolled and circle the corresponding year benefits will be used.
3. Fill in the name and location of the eligible higher education institution enrolled. A copy of the tuition & fee invoice from the school the beneficiary is enrolled must be submitted with the distribution request form.
4. Select the type of program the Beneficiary is enrolled- Baccalaureate or Associate/Certificate.
5. Indicate the Payee you want the distribution check made payable to. The Payee must be one of the following: the Account Owner, the Beneficiary or an Eligible Higher Education Institution. Checks made payable to an Eligible Higher Education Institution will be mailed to the Institution. Checks payable to the Account Owner or the Designated Beneficiary will be mailed to the Account Owner. Provide an alternate address if you do not want the distribution check mailed to the Account Owner.

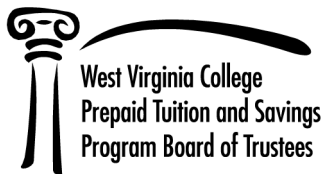
Section B

Leave blank if requesting a normal semester benefit value distribution. If canceling or transferring your account, provide the information requested.

Section C. Signature: You must sign and date your Prepaid Tuition Plan Distribution Request Form.

Submit the completed Form to: SMART529 WV Prepaid Tuition Plan, PO Box 44070,
Jacksonville FL 32231-4070

Note on Signature Guarantee--Signature Guarantee is only required if the Account Owner's signature is not on file with the WV Prepaid Tuition Plan, as would be the case with someone who enrolled in the Plan via the program website using a paperless application. If you originally submitted a signed enrollment application form to the Plan, no signature guarantee is necessary. Signature guarantee is available at most banks and brokerages. If in doubt, call Customer Service to check. An approved Signature Guarantee applies to all accounts opened by the Account Owner. Once received, you will not need to submit additional Signature Guarantees.



West Virginia College
Prepaid Tuition and Savings
Program Board of Trustees

SMART529 WV Prepaid Tuition Plan

SMART529 is a program of the West Virginia College Prepaid Tuition and Savings Program Board of Trustees

Service Center:
Toll-free at 1-866-574-3542
Monday – Friday, 8:00 a.m. to 6:00 p.m. EST
Fax Nbr: 1-800-519-4652

Mail:
SMART529 WV Prepaid Tuition Plan
PO Box 44070, Jacksonville, FL 32231- 4070

Internet Address:
SMART529.com

Distribution Request Form

1. Account Owner Information

Account Owner Name			Account Number	
Last	First	MI		
Account Owner Address				
Street		City	State	Zip
Daytime Phone () ()		Evening Phone () ()	Account Owner Social Security Number - -	
Designated Beneficiary Name			Designated Beneficiary Social Security Number	
Last	First	MI	-	-

2. Distribution Information

Please select one Distribution option either A, B, or C and complete that section.

Note: The earnings portion of a non-qualified distribution is subject to Federal and West Virginia state income tax and may be subject to a federal tax penalty. An administrative fee may be assessed by the Program on account cancellations and rollovers.

A. Distribution of Semester's Benefit Value. Please complete sections 1, 2, 3, 4, and 5 below.

1. Amount of distribution requested (check one):

- Distribute full semester benefit value
 Distribute other amount. List amount desired: \$ _____

(Amounts in excess of current semester's benefit value may not be available)

2. Check one of the following terms and circle the corresponding year benefits will be used.

- Fall Spring Summer Year: 2007 2008 2009 2010

3. Name and location of the Eligible Education Institution at which the Designated Beneficiary is enrolled.

Please attach a copy of the tuition and fee invoice from the Eligible Education Institution.

School Name: _____

Street _____ City _____ State _____ Zip _____

4. Program in which the Designated Beneficiary is enrolled (check one):

- Baccalaureate degree Associate degree/ Certificate program.

5. Payee Designation - Make the distribution check payable to the (check one):

- Account Owner Designated Beneficiary Eligible Education Institution listed above

Distribution checks made payable to WV public colleges/ universities will be mailed directly to the institution. All other distributions will be mailed to the Account Owner at the address on file unless the Account Owner provides an alternate address.

Street _____ City _____ State _____ Zip _____

B. Cancellation of Entire Account. I wish to cancel my Prepaid Tuition account due to:

- Death of Designated Beneficiary Disability of Designated Beneficiary Other reason

Note: Include a copy of the death certificate or supporting documentation of the disability

C. Transfer/ Rollover

I wish to Transfer/ Rollover my account to another Qualified Tuition Plan as indicated below.

Program Name: _____ Account Number: _____

Address: _____

3. Signature

By signing below, I certify that I am the Account Owner and that all of the information provided on this form is complete and correct. I agree to provide proof of the Designated Beneficiary's enrollment at the Eligible Education Institution, listed above in Section A. I agree to indemnify and hold harmless the West Virginia College Prepaid Tuition and Savings Program Board of Trustees or its designated agent, The Hartford Life Insurance Company, and its affiliates and subsidiaries for any loss, liability or expense incurred from acting on these instructions. **Signature Guarantee** Required if: signature is not on file and either account address changed within the last 15 days or distribution is not being sent to address of record or to an eligible education institution. **Signature guarantee** can be obtained from banks, brokerages and other financial institutions.

Account Owner Signature

Date

Signature Guarantee

Date