

TRANSFER REQUEST

Use this form to transfer units from one GET account to another. **The maximum lifetime limit per individual student is 800 units.** The student receiving units must be a family member of the student transferring units. According to the IRS, family members include spouses, parents/stepparents, siblings/step-siblings, aunts/uncles and first cousins. For a complete list of eligible family members, please review IRS Publication 970 or call us. If you are transferring units to a different account owner a Notary signature is required and you must mail an original, notarized form, along with the required signatures noted below, to complete your request. E-signatures are not accepted. Faxed or photocopied forms are accepted for transfers that do not require a Notary. **You can complete a transfer request using your online account if you are the account owner on both accounts.**

Account Owner Information

Name (First, Middle, Last, Suffix) _____ SSN or TIN _____
 Street Address/Apartment Number _____ Email Address _____
 Post Office Box Number _____ Phone Number _____
 City/State/ZIP _____ Home _____ Work _____

Unit Transfer Information (Units must be 2 years old before they can be transferred)

Transfer **From:** _____
 GET Account Number _____ Student Beneficiary's Name _____
 Transfer **To:** _____
 GET Account Number _____ Student Beneficiary's Name _____

Please choose one - (The maximum lifetime limit per individual student is 800 units.)

- Partial unit transfer / number of units to transfer: _____
- Convert this account to lump sum and transfer all units (non-paid-in-full Custom Monthly accounts only).
- Transfer all units and close this account.

Account Owner's Signature - Required Forms must be signed by hand. E-Signatures will NOT be accepted.

By signing this form, I hereby certify and acknowledge that: I am the Account Owner and the information in this form is true, complete and accurate. I authorize GET, its agents and affiliates to act on instructions in this form believed to be genuine and from me. I authorize these requested changes to my Account.

Account Owner's Signature Must be 18 or older & Notary must witness signature (as noted below) **Date** (must match date of Notary)

Notary Section - (Only required when units are being transferred to a different Account Owner)

I certify that I know or have satisfactory evidence that (NAME) _____ is the person who appeared before me, and said person acknowledged that they signed this instrument and acknowledged it to be their free and voluntary act for the uses and purposes mentioned in the instrument.

(Seal or Stamp) **Date** _____ **Notary Signature** _____
 (must match date of Account Owner)
Printed Name _____
County of _____ **Title** _____
State of _____ **My Appointment Expires** _____

(Notary signature and name on seal must match exactly. Electronic Notary will not be accepted.)