



# Incoming Rollover Form - Same Beneficiary

## Important information about this form:

- An eligible person can only have one ABLÉ account open at any time.
- Close your prior ABLÉ account before you start this rollover process.
- If you don't already have an Oregon ABLÉ Savings Plan, fill out an Enrollment Form or sign up online at [www.OregonAbleSavings.com](http://www.OregonAbleSavings.com).
- The rollover assets must be deposited within 60 days of withdrawal from the original ABLÉ account.
- You can roll over assets from one ABLÉ account to another ABLÉ account once every 12 months.
- Make sure you use black ink to type or print clearly in capital letters and do not staple the pages together.
- Your rollover assets will be allocated based on the Oregon ABLÉ Savings Plan account asset allocations you selected.
- Include a check from a bank account associated with the Beneficiary or Authorized Legal Representative on the ABLÉ account.

## Need help?

Give us a call Monday – Friday from 9am – 5pm PT at **1-844-999-ABLE** or from 6am – 5pm PT at **1-844-888-ABLE (TTY)**

## Mail the form to:

Oregon ABLÉ Savings Plan  
P.O. Box 9891  
Providence, RI 02940-8091

**If you already have an Oregon ABLÉ Savings Plan, fill out Step 1. If you don't have an account fill out the Enrollment Form (or sign up online) and jump to Step 2.**

## 1 Account information

This is the account you're rolling assets into.

\_\_\_\_\_  
Name of the Beneficiary on the ABLÉ account (First and last)

\_\_\_\_\_  
**Oregon ABLÉ Savings Plan number**  
If you have an online account and are looking for the account number, check your Account Edit page on the website.

\_\_\_\_\_  
**Beneficiary's Social Security or Taxpayer Identification Number**

## Who should we contact?

We need the following information for either the Beneficiary or Authorized Legal Representative in case we need to chat about the account:

\_\_\_\_\_  
Contact name (First and last)

\_\_\_\_\_  
Telephone number

## 2 Rollover assets

To roll over assets from another ABLE account, you have to deposit assets within 60 days of the withdrawal. Include a statement from the prior account that shows the breakdown of the contributions and earnings to verify that it is a rollover. Until you send the statement, the entire deposit in your Oregon ABLE Savings Plan account will be considered earnings.

### Tell us what's on the check:

Make the check payable to the Oregon ABLE Savings Plan for the amount of:

\$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
The full amount of the Rollover

### We also need to know:

This doesn't need to be included on the check, but we need this information for our records.

\$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
The principal of the Rollover

\$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
The earnings of the Rollover

## 3 Sign this form

By signing this, you're agreeing to these statements:

- I confirm that I received, understand, consent, and agree to all the terms and conditions of the Oregon ABLE Savings Plan Disclosure Booklet as they relate to this incoming rollover request.
- I authorize the Plan Manager, or its designee, to roll over assets into the Oregon ABLE Savings Plan according to these instructions.
- If I'm an Authorized Legal Representative, I certify that I am authorized to act on behalf of the Beneficiary in making this request and that this request is in the best interest of the Beneficiary.
- I certify that this is the only rollover for this Beneficiary's ABLE account in the last 12 months.
- This request was made within 60 days of the withdrawal and the other ABLE account has been closed (since I can only have one account nationwide).
- I understand that I cannot make additional contributions when the fair market value of my ABLE account exceeds \$310,000.
- I understand that the Authorized Legal Representative or Beneficiary of the account from which assets are being withdrawn is responsible for providing the Oregon ABLE Savings Plan with a statement that certifies

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the breakdown of the assets transferred. I further understand that until such statement is provided, the Oregon ABLE Savings Plan will treat the entire transfer as earnings.

- I understand that a rollover that doesn't meet these conditions may result in the earning portion of the deposit being considered a non-qualified withdrawal subject to federal income tax and an additional 10% federal tax, and may be subject to state or local income tax.

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**Signature of Beneficiary or Authorized Legal Representative**

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**Date** (mm/dd/yyyy)