COVERDELL

ESA CONTRIBUTION AND INVESTMENT SELECTION

PART 1. DESIGNATED BENEFICIARY

Name (First/MI/Last) _____

Social Security Number _____

Date of Birth _____

Account Number _____ Suffix _____

PART 2. COVERDELL ESA TRUSTEE OR CUSTODIAN

To be completed by the Coverdell ESA trustee or custodian

Name _____

Address Line 1 _____

Address Line 2 _____

City/State/ZIP _____

Phone _____ Organization Number _____

PART 3. CONTRIBUTION INFORMATION

Contribution Amount _____ Contribution Date _____

CONTRIBUTION TYPE (Select one)

☐ 1. **Regular** Contribution for Tax Year _____

☐ 2. **Rollover** (Distribution from a Coverdell ESA that is being deposited into this Coverdell ESA)
By selecting this transaction, I irrevocably designate this contribution as a rollover.

☐ 3. **Transfer** (Direct movement of assets from a Coverdell ESA into this Coverdell ESA)

CONTRIBUTOR INFORMATION

Name (First/MI/Last) _____ Phone _____

PART 4. INVESTMENT AND DEPOSIT INFORMATION

INVESTMENT INFORMATION (This section may only be completed by the responsible individual. Complete this section as applicable.)

Investment Description	Quantity or Amount	Status (none or nothing)	Investment Number	Term or Maturity Date	Interest Rate

DEPOSIT METHOD

☐ **Cash or Check** (If the contribution type is transfer, the check must be from a financial organization made payable to the trustee for this Coverdell ESA.)

☐ **Internal Account**
Account Number _____ Type (e.g., checking, savings, Coverdell ESA) _____

☐ **External Account** (e.g., EFT, ACH, wire)
Name of Organization Sending the Assets _____ Routing Number (optional) _____
Account Number _____ Type (e.g., checking, savings, Coverdell ESA) _____

Deposit Taken by _____

PART 5. SIGNATURE

I certify that all of the information provided by me is accurate and may be relied upon by the trustee or custodian. I certify that the contribution described above is eligible to be contributed to the Coverdell ESA and I authorize the deposit/investment in the manner described above.

X _____ _____
Signature of Coverdell ESA Contributor/Responsible Individual Date (mm/dd/yyyy)