



**College Savings Bank®**

## College Savings Bank Internal Transfer Form

**Mail To:**

College Savings Bank  
PO Box 3769  
Princeton, NJ 08543

call, e-mail or log on for assistance:

1-800-888-2723

info@collegesavings.com

http://www.collegesavings.com

**Please submit this form along with your College Savings Bank enrollment form.**

**Account Number:**

(Please provide an account number from which you are transferring funds. Fill out a separate form for each account.)

Account Number \_\_\_\_\_

Note: Existing Custodial Accounts established under UGMA/UTMA upon reinvestment must remain as such within College Savings Bank 529 program.

**College Savings Bank Certificate Options:**

- 1-Year Fixed Rate CD
- 3-Year Fixed Rate CD
- CollegeSure® CD\*
- InvestorSure® CD\*\*

\*Minimum investment amount: \$250. Maturity dates available: 2012-2033

\*\*Minimum investment amount: \$1,000. Funds held to maturity will receive 85% of the average increase in the S&P 500®. Term of 5-year maturity.

**Account Owner's Information**

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security Number \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_

E-Mail Address \_\_\_\_\_

**Amount:**

- Full Balance
- Other: \$ \_\_\_\_\_ . \_\_\_\_\_

**Signature of Account Owner**

By signing below, I acknowledge that I authorize the certificate purchase which is subject to existing terms and conditions outlined in the Bank's product disclosures. By signing below, I authorize College Savings Bank to internally transfer funds from one existing College Savings Bank 529 account into a College Savings Bank 529 certificate product specified above. Please read the investment terms and conditions and product disclosures carefully before you invest or send any money.

Signature \_\_\_\_\_ Date \_\_\_\_\_