

NC 529 Plan

North Carolina's National College Savings Program

Incoming Rollover Form



Make checks payable to: "NC 529 Plan"

To complete this form, please print clearly, preferably in capital letters and black ink.

This form will initiate a Rollover of assets from another 529 plan or Coverdell Education Savings Account (ESA) to an existing Account in North Carolina's National College Savings Program. Note: If you have not established an Account, you must also complete online or by mail an Enrollment and Participation Agreement.

When complete, please send this form to your current plan administrator.

To order any form or ask questions about the Program, please call us toll free at 800-600-3453, Monday – Thursday, 8 a.m. – 8 p.m. and Friday, 8 a.m. – 5 p.m. ET. Forms and information are also available online at CFNC.org/NC529.

Mail to: NC 529 Plan
P.O. Box 40877
Raleigh, NC 27629-0877

Overnight or registered mail: NC 529 Plan
2917 Highwoods Blvd.
Raleigh, NC 27604

Fax to: 919-835-2304

For questions or forms, contact the Program Administrator College Foundation, Inc.

1 Your Current 529 Program Manager or Coverdell ESA Custodian

The 529 plan or Coverdell education saving account (ESA) from which you are moving assets must have the same Participant name as well as Social Security or Taxpayer Identification Number as your Account in the NC 529 Plan.

Account Number of 529 Program or Coverdell ESA

Name of Current Program Manager or Custodian (First, Middle, Last, Suffix)

Address (line 1)

Address (line 2)

City State Zip or Postal Code Country (if not U.S.)

Contact Person (First, Middle, Last, Suffix)

Primary Telephone Number (8:00 a.m. to 5:00 p.m.) Alternate Telephone Number

E-mail Address

Check this box if the Beneficiary on this Account is different from the Beneficiary associated with your NC 529 Account named in Section 3.

