

2 Rollovers *(continued)*

The Participant **MUST** submit a statement or letter from the former qualified tuition program (2A) or, in the case of a Rollover between Accounts (2B), the Program Administrator will complete the information showing the date of Withdrawal, the total Rollover amount, and the portions attributable to Contributions and earnings. Until the breakdown is provided, the Program will treat the entire amount of the Rollover as earnings.

Check any below that apply and complete the corresponding information.

A. Rollover from Another Qualified Tuition Program

Until the specified documentation is provided by the former program, the Program will treat the entire amount of this Rollover as earnings.

□□-□□-□□□□

Date Withdrawal Made (month, day, year)

Amount Considered Contribution \$ □□□, □□□. □□

Amount Considered Earnings + \$ □□□, □□□. □□

TOTAL = \$ □□□, □□□. □□

B. Rollover Between Existing Accounts in North Carolina's National College Savings Program

Rollovers *from* funds allocated to the Protected Stock Fund are not permitted.

Please provide directions below.

Move funds *from* Account (a): □□□□□□□□□□-□□□□
Account Number

into Account (b): □□□□□□□□□□-□□□□
Account Number

Amount *(Check one.)*

Full Balance.

Close Account (a) and move total amount into Account (b).

Partial Balance.

Deduct the following amount from Account (a) and move it into Account (b): \$ □□□, □□□. □□

Note: Withdrawal from Account (a) will be taken proportionally from each available Investment Option.

For NCSP Program Administrator Use Only

Date Withdrawal Made from Account (a)	Amount Considered Contribution	Amount Considered Earnings	Total Amount of Rollover
□□-□□-□□□□ (month, day, year)	\$ _____	+ \$ _____	= \$ _____

