Important information about this form:

- Fill out this form to setup, remove, or change recurring monthly withdrawals to your Alabama ABLE account.
- You must have an open account to use this form. If you need to sign up, go online to www.AlabamaABLE.gov or use an Enrollment Form before completing this form.
- We are required to file an IRS Form 1099-QA when you make a withdrawal from your account.
- Withdrawals may have tax consequences depending on how the distribution is used. You should consult your tax advisor.
- A Medallion Signature Guarantee is required for any withdrawals over $50,000 or any withdrawals to 3rd parties.
- Keep any receipts for eligible expenses once the money from this account is used.
- Make sure you use black ink. Type or print clearly in capital letters.

Alabama ABLE account information

Name of the Beneficiary on the ABLE account (First and last)

___ ___ ___ – ___ ___ – ___ ___ ___ ___ ___ 
Beneficiary’s Social Security or Taxpayer Identification Number

___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ 
Alabama ABLE account number

Instructions

- Stop all monthly withdrawals from this account (skip to Step 7)
- Change all monthly withdrawals from this account (complete Steps 3, 4, and 7)
- Create a new monthly withdrawal from this account (complete Steps 3, 4, and 7)
Choose the type of withdrawal

- Direct deposit into the bank account connected to this account (Fill out Step 5 and 7)
  If there is more than one bank account connected to the account, you'll have to select which bank you want to receive the deposit. There will be a 30-day hold if there was a recent change to the banking information.

- A check sent to the mailing address on the account (Fill out Step 7)
  There will be a 30-day hold period for check withdrawals if you recently changed the mailing address.
  Please note: There is a $2.50 fee for withdrawals issued via check.

  Who should we make the check out to?  
  - Beneficiary
  - Authorized Legal Representative

- A check sent to a third party (Fill out Step 6, 7, and 8)
  Please note: There is a $2.50 fee for withdrawals issued by check.

*A note on when withdrawals will be deducted from your account: If the Withdrawal Day you've selected falls on a regular business day, your withdrawal will be deducted from your account two business days prior to the Withdrawal Day. If the Withdrawal Day you've selected falls on a weekend or a holiday, the withdrawal will be deducted from your account on the next Business Day. The withdrawn amount should reach your bank account within 2–5 business days.*
Monthly withdrawal setup

Tell us how much you want to withdraw from your account each month. There is a $5 minimum withdrawal from each portfolio you select.

<table>
<thead>
<tr>
<th>Portfolio</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservative Portfolio</td>
<td>$ __ __ ___ , __ ___ ___ · __ ___</td>
</tr>
<tr>
<td>Moderate Portfolio</td>
<td>$ __ __ ___ , __ ___ ___ · __ ___</td>
</tr>
<tr>
<td>Aggressive Portfolio</td>
<td>$ __ __ ___ , __ ___ ___ · __ ___</td>
</tr>
<tr>
<td>FDIC Savings Fund</td>
<td>$ __ __ ___ , __ ___ ___ · __ ___</td>
</tr>
</tbody>
</table>

Withdrawal Day (1 – 28)*
If you don’t pick a date, we’ll automatically deduct your withdrawal on the 1st of every month.

* A note on when withdrawals will be deducted from your account: If the Withdrawal Day you’ve selected falls on a regular business day, your withdrawal will be deducted from your account the same day. If the Withdrawal Day you’ve selected falls on a weekend or a holiday, the withdrawal will be deducted from your account on the next Business Day. The withdrawn amount should reach your bank account within 2–5 business days.
Bank account information

Attach a voided check or copy of your bank statement showing the name, address, the account number and complete the bank information below. (Please do not staple, use a paper clip for the check).

What type of documentation are you including to verify this bank account?

- Voided check
- Bank statement

Bank account type

- Checking
- Savings

Name on bank account
The first and last name on the bank account needs to be the same as either the Beneficiary or the Authorized Legal Representative.

Bank name

Routing number

Bank account number

Need help?
You can find your bank information on the bottom of one of your checks here:

Routing Number 1000
Account Number
Third-party information

_________________________
Payable to

_________________________
Contact name

_________________________
Memo line

Mailing address

_________________________  ______________________
Street address 1                  Street address 2

_________________________
City             _____________  ___-____-____-____

State        ZIP Code
Sign the form

By signing this form, you're confirming that the information provided is accurate, and true and that you agree and certify that:

- If I selected Stop all monthly withdrawals from this account, or Replace all monthly withdrawals from this account:
  - I understand that all currently active monthly withdrawals from this account will be cancelled.
  - I understand that my request will become effective once processed by the Program and that the Program must receive my request at least 1 business day before I want it to become effective.

- If I selected Create a new monthly withdrawal from this account, or Replace all monthly withdrawals from this account:
  - I understand this authorizes the Program to initiate recurring withdrawals from my ABLE United account and to either: (i) make recurring deposits to my bank account; (ii) send checks to my address; or (iii) send checks to a third party on the Withdrawal Day each month for the total withdrawal amount.*
  - I understand that if there is not enough money in my account to complete the recurring withdrawal or if the withdrawal amount is greater than 90% of my account balance, it will fail.
  - I may cancel these recurring monthly withdrawals by using this form.

---

Signature of Beneficiary or Authorized Legal Representative

Date (mm/dd/yyyy)

---

* A note on when withdrawals will be deducted from your account: If the Withdrawal Day you've selected falls on a regular business day, your withdrawal will be deducted from your account the same day. If the Withdrawal Day you've selected falls on a weekend or a holiday, the withdrawal will be deducted from your account on the next Business Day. The withdrawn amount should reach your bank account within 2–5 business days.
Medallion Signature Guarantee

Keep in mind that:

• You're providing the following information as underwritten certification that your signature is genuine.

• You can get a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public doesn’t qualify, and you cannot guarantee your own signature.

• Only sign if you are in the presence of an authorized officer providing the Medallion Signature Guarantee.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the Plan Disclosure Booklet.

________________________________________
Signature of Beneficiary or Authorized Legal Representative

________________________________________
Signature Guarantor

________________________________________
Title

________________________________________
Name of Institution

________________________________________
Date (mm/dd/yyyy)

Have the Authorized Officer stamp here