



The Vanguard 529 College Savings Plan Withdrawal Request Form

- You can request a withdrawal online at vanguard.com.
- Complete this form to request a qualified withdrawal or nonqualified withdrawal from your account. You must submit a separate form for each type of withdrawal you are requesting. **Note:** The earnings portion of a nonqualified withdrawal may be subject to federal income tax and a 10% federal penalty tax, as well as state and local income taxes. Withdrawals can be used to pay for i) expenses for tuition in connection with enrollment or attendance at an elementary or secondary public, private, or religious school, ii) expenses related to apprenticeship programs, or iii) education loan repayments. **Withdrawals for qualified K–12 tuition, education loan repayments, or apprenticeship program expenses are not subject to federal tax; however, state tax treatment of such withdrawals is determined by the state(s) where the taxpayer files state income tax. Please consult with a tax advisor for further guidance.**
- Contributions and rollovers by check, automatic investment plan (AIP), and electronic bank transfer (EBT) will be held for seven business days. We'll process the withdrawal on the appropriate trade date, but we won't send proceeds from the withdrawal request until the money has been collected.
- If you submit this form within nine business days of changing your address, we'll process the withdrawal on the appropriate trade date, but we'll hold the proceeds of the withdrawal for nine business days from the date of the change before mailing them to the new address.
- Print clearly, preferably in capital letters and black ink.

Forms can be downloaded from our website at vanguard.com/serviceforms. Or you can call us toll-free to order any form at **866-734-4530** on business days from 8 a.m. to 8 p.m., Eastern time. Return this form and any other required documents in the enclosed postage-paid envelope, or mail to **The Vanguard 529 College Savings Plan, P.O. Box 55111, Boston, MA 02205-5111**. For overnight delivery or registered mail, send to **The Vanguard 529 College Savings Plan, 95 Wells Avenue, Suite 155, Newton, MA 02459-3204**.

1. Account owner information

Account number	Social Security number or other taxpayer ID number <i>required</i>
Name of account owner <i>first, middle initial, last</i>	
Daytime phone <i>area code, number, extension</i>	Evening phone <i>area code, number, extension</i>
Mobile	Mobile

2. Beneficiary information

Social Security number or other taxpayer ID number <i>required</i>	
Name of beneficiary <i>first, middle initial, last</i>	

Remember to sign in Section 5.



Mailing address		
City	State	Zip

3. Reason for withdrawal *Choose **ONLY ONE** of the following six options.*

Withdrawals can be used to pay for higher education expenses, qualified K–12 tuition expenses, apprenticeship program expenses, or student loan repayments, and are not subject to federal tax. However, with the exception of qualified higher-education expenses, state tax treatment of withdrawals used to pay for such expenses is determined by the state(s) where the taxpayer files state income tax. Please consult with a tax advisor for further guidance.

A. Qualified withdrawal to the account owner.* My withdrawal will be used to pay for the beneficiary's qualified higher-education expenses, K-12 tuition expenses, apprenticeship program expenses, or education loan repayments. *(You will receive a check at your address of record.)*

B. Qualified withdrawal to the beneficiary.* My withdrawal will be used to pay for the beneficiary's qualified higher-education expenses, K-12 tuition expenses, apprenticeship program expenses, or education loan repayments. *(The beneficiary will receive a check at the address you indicated in **Section 2.**)*

C. Qualified withdrawal to an eligible college, university, trade school, vocational school, apprenticeship program, or elementary or secondary school.* *(Provide the **exact** school address below.)*

Name of school *Complete only if check is to be sent directly to the school.*

Department/Office

Mailing address

City

State

Zip

Phone *area code, number, extension*

Student ID number *A student identification number may be required by some colleges and universities*

D. Indirect rollover. Send a check to me at my address of record. I will invest it in another qualified 529 plan or in an Achieving a Better Life Experience account (a.k.a. "ABLE account") within the next 60 days. ABLE accounts are tax-free savings accounts for people with disabilities and their families.

E. Nonqualified withdrawal to the account owner.** My withdrawal will **not** be used to pay for the beneficiary's qualified higher-education expenses, K–12 tuition expenses, apprenticeship program, or education loan repayments. *(You will receive a check at your address of record.)*

F. Nonqualified withdrawal to the beneficiary.** My withdrawal will **not** be used to pay for the beneficiary's qualified higher-education expenses, K–12 tuition expenses, apprenticeship program, or education loan repayments. *(The beneficiary will receive a check at the address you indicated in **Section 2.**)*

*The IRS may require you to substantiate that your withdrawal is qualified. Consult the IRS or your tax advisor for current documentation requirements.

**Earnings on nonqualified withdrawals may be subject to federal income tax and a 10% federal penalty tax, as well as state and local income taxes. The availability of tax or other benefits may be contingent on meeting other requirements. State tax treatment of withdrawals used for i) expenses for tuition in connection with enrollment or attendance at an elementary or secondary public, private, or religious school, ii) expenses related to apprenticeship programs, or iii) education loan repayments is determined by the state(s) where the taxpayer files state income tax. Exceptions to this penalty include withdrawals made because the beneficiary has died, become disabled, received a scholarship, or is attending a military academy, as described in the Program Description. Contact your tax advisor about how to report a nonqualified withdrawal.

4. Amount of withdrawal *Check one.*

Contributions and rollovers by check, automatic investment plan (AIP), or electronic bank transfer (EBT) will be held for seven business days.

A. Total account balance. Withdraw the entire amount held in all of the investment options in my account, cancel my automatic investment plan *(if applicable)*, and close this account.

B. Partial amount of \$_____ proportionately from amount my current investment options.
(Important: If the dollar amount you indicate exceeds the amount available for withdrawal from your account, we will liquidate the entire balance of your account.)

C. Partial amount as follows. *(To list more than three investment options, provide the information on a separate sheet. Important: If the dollar amount you indicate for a particular investment option exceeds the amount available for withdrawal, we will liquidate the entire balance of that investment option.)*

Name of investment option	Dollar amount <i>for partial amounts</i> OR Total balance <i>check if applicable</i> \$
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5. Signature—YOU MUST SIGN BELOW

I certify that I have read the Program Description and understand the rules and regulations governing withdrawals from The Vanguard 529 Plan.

Signature of account owner X	Today's date <i>mm dd yyyy</i> M M - D D - Y Y Y Y
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