

Coverdell Education Savings Account (ESA) Distribution Request Form



Return Options:

Electronically via Message Center:

Log in and go to Client Services > Message Center to attach the file

Regular Mail:

PO Box 2760, Omaha, NE 68103-2760

Overnight Mail:

200 South 108th Avenue
Omaha, NE 68154-2631

Fax: 866-468-6268

Questions? Call a IRA representative at 888-723-8504, option 2

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Designated Beneficiary (Student) Information

TD Ameritrade Account Number:

Full Legal Name:

Date of Birth (MM-DD-YYYY):

U.S. Social Security Number(SSN):

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Custodian Information

Full Legal Name:

Date of Birth (MM-DD-YYYY):

U.S. Social Security Number(SSN):

Home Address (no PO box or mail drop):

City:

State:

Zip Code:

Country:

Mailing Address (if different from above):

City:

State:

Zip Code:

Country:

Primary Phone number:

Secondary Phone number:

Email Address:

Should TD Ameritrade need to contact you in regards to this request, your preferred method of contact is: Email Primary Phone



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Distribution Amount

I instruct TD Ameritrade, Inc. to initiate a:

- Total distribution of my entire account and close the account.
- Partial cash distribution of exactly \$ _____.
- Partial distribution of the following securities (number of shares and identification of security).

If you wish to liquidate the selected securities and receive the cash proceeds, you may select cash and sell the assets online at www.tdameritrade.com or by calling 800-669-3900..

Security/Asset Description	Requested Quantity	Security/Asset Description	Requested Quantity
1. _____	_____	6. _____	_____
2. _____	_____	7. _____	_____
3. _____	_____	8. _____	_____
4. _____	_____	9. _____	_____
5. _____	_____	10. _____	_____

Please attach additional sheet if more space is needed.

- I certify that the recipient of this request qualifies as a family member as dictated by IRS publication 970, section 8.

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Distribution Method

I instruct TD Ameritrade Clearing, Inc. to distribute the amount stated in the following manner:

Make this payment:

(Please select one of the following options. If nothing is selected, your distribution will be mailed to the address listed on your account.)

- To another TD Ameritrade Coverdell ESA account number: _____

For an education expense:

- To my TD Ameritrade non-retirement account number: _____

By Mail

- Check
Delivery Method:
 - U.S. First-Class Mail (default)
 - Overnight at My Expense
- To the address on record
- To an alternate Address
 - This is my new address of record

Address:

City: _____	State: _____	Zip Code: _____	Country: _____
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- To an alternate payee
Name: _____

