



Coverdell Education Savings Account (ESA) Verbal Distribution Authorization Form

PO Box 2760 ■ Omaha, NE 68103-2760

Fax: 866-468-6268

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

Use this form to request or update verbal distributions for Coverdell ESAs only.

1. DESIGNATED BENEFICIARY (STUDENT) INFORMATION

Account Number:

Full Legal Name:

Date of Birth:
(MM-DD-YYYY)

U.S. Social Security Number:
(SSN)

2. CUSTODIAN INFORMATION

Full Legal Name:

Date of Birth:
(MM-DD-YYYY)

U.S. Social Security Number:
(SSN)

Primary Phone:

Secondary Phone:


Email Address:

3. VERBAL DISTRIBUTION AUTHORIZATION

By signing this document, you are authorizing TD Ameritrade to accept verbal distribution instructions for variable amounts. Verbal distributions can be established and authorized only by you, the custodian of this Coverdell ESA. Only one verbal distribution form may be in effect at a time and a separate form is needed for each of your Coverdell ESAs.

4. SIGNATURE

I understand that, subject to the provisions of the Agreement, I have full discretion and control over the form of payment or payments of the entire balance in the Account. I shall exercise control by directing that such payment or payments be made as described above, and TD Ameritrade Clearing, Inc. shall have no responsibility or liability with respect to the choice of any such form of payment or payments. I attest that I am the proper party to receive payment or payments from this Coverdell ESA and that all information provided by me on this form, including supplemental material, is true and accurate. I certify that no tax advice has been given to me by TD Ameritrade, Inc. or TD Ameritrade Clearing, Inc., and that all decisions regarding this withdrawal are my own. I expressly assume the responsibility for any adverse consequences which may result from the withdrawal; and I indemnify and hold harmless TD Ameritrade, Inc. and TD Ameritrade Clearing, Inc., their divisions, officers, employees, directors, representatives, owners, affiliates, successors, and assigns.

 Custodian's Signature:

Date:

Original signature required; electronic and/or signature fonts are not authorized.

Investment Products: Not FDIC Insured * No Bank Guarantee * May Lose Value

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