

**Important information about this form:**

- Fill out this form to make a full or partial withdrawal from your DreamAhead account.
- We are required to file an IRS Form 1099-Q when you make a withdrawal from your account.
- There's a \$5 minimum withdrawal for each portfolio.
- You can withdraw up to 90% of the total amount in a portfolio or the full amount. The minimum balance for each portfolio is \$25 unless you decide to withdraw the full amount.
- You must wait 5 days before you can withdraw a contribution made by bank ACH or check.
- Withdrawals may have tax consequences depending on how the distribution is used. You should consult your tax advisor.
- Keep all of your receipts for qualified education expenses for tax purposes.
- If you recently changed your bank account information or address on file, you must wait 30 days before you can make a withdrawal, unless you provide a Medallion Signature Guarantee (**Step 8**).
- A Medallion Signature Guarantee is required: (i) for withdrawal requests of \$100,000 or more; (ii) for an Entity Account or an Account for which the individual completing the form is acting in a legal capacity as a representative of the Account Owner or (iii) if the address on the account has been changed (**Step 8**).
- Use black ink to type or print clearly, and do not staple the sheets together.

**Need help?**

Give us a call Monday – Friday  
from 6am – 5pm PT at  
**1-844-529-5845** or  
**1-844-888-2253 (TTY)**

**Mail the form to:**

DreamAhead College  
Investment Plan  
P.O. Box 9661  
Providence, RI 02940-9661

**Overnight Mail:**

DreamAhead College  
Investment Plan  
4400 Computer Drive  
Westborough, MA 01581

**1 DreamAhead account information**

\_\_\_\_\_

Name of Account Owner (First and last)

— — — — — — — — — — — — — — — — — —

Account Owner's Social Security or Taxpayer Identification Number

\_\_\_\_\_

DreamAhead account number

## 2 Withdrawal amount

Choose the portfolio(s) you want to withdraw money from. There's a \$5 minimum withdrawal and you must have at least \$5 in a portfolio to keep it open. You can withdraw up to 90% of the total amount or the full amount.

For a full list of all the portfolio options and for important information about the investment options please see the **Program Details Booklet** before making a decision.

You must wait 5 days before you can withdraw a contribution made by bank ACH or check contribution.

Please clearly print the portfolio name, code and amount you'd like to withdraw below. Reference the **Investment Portfolio Options Appendix** at the end of this form for a list of all portfolio names and codes.

\_\_\_\_\_ \$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
 Code Portfolio name Amount

Full balance  Partial amount

\_\_\_\_\_ \$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
 Code Portfolio name Amount

Full balance  Partial amount

\_\_\_\_\_ \$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
 Code Portfolio name Amount

Full balance  Partial amount

\_\_\_\_\_ \$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
 Code Portfolio name Amount

Full balance  Partial amount

Want to withdraw all funds?

Yes, withdraw the full balance of all portfolios I'm invested in.

\$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_  
 Total withdrawal amount

Close this account

Only check this if you want to close your account once all funds are withdrawn.

**Have more portfolios you want to withdraw from?**

Sign in online to make additional withdrawals at [www.DreamAhead.wa.gov](http://www.DreamAhead.wa.gov)

### 3 Payee information

- Account Owner/Custodian  
This will be the tax responsible party who will receive the 1099-Q form.
- Beneficiary  
This will be the tax responsible party who will receive the 1099-Q form.
- Check to eligible Educational Institution or School (Skip to **Step 6**)  
The Beneficiary will be the tax responsible party who will receive the 1099-Q form.

### 4 Delivery information

- Deposit into bank account (Continue to **Step 5**)
- Check sent to mailing address listed on the account (Skip to **Step 7**, \$2.50 fee)

\* If the address for this individual (where the check will be mailed) has changed in the last 30 days you'll need to get a Medallion Signature Guarantee in **Step 8**.

## 5 Bank account information

Only fill out this information if you are making a withdrawal to a bank account connected to your account.

If the information for this bank account has been changed in the last 30 days, you'll need to get a Medallion Signature Guarantee in **Step 8**.

\_\_\_\_\_  
**Name on bank account**  
 The Account Owner/Custodian or Beneficiary must own the bank account connected to the DreamAhead account.

\_\_\_\_\_  
**Bank Account Holder Signature**  
 (If different from DreamAhead Account Owner/Custodian)

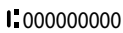
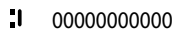

**Bank account type**     Checking     Savings

\_\_\_\_\_  
**Bank name**

\_\_\_\_\_  
**Bank routing number**

\_\_\_\_\_  
**Bank account number**

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

 0000000000	 000000000000	 1000
Routing Number	Account Number	

## 6 Eligible Educational Institution or School information

Only fill this information out if you are making a withdrawal to an eligible educational institution.

Please confirm the mailing instructions with your school before submitting this form for payment and provide a student ID, if required by the school.

\_\_\_\_\_  
**Eligible Educational Institution or School name**

\_\_\_\_\_  
**Student name, ID or other identifying information** (Will only appear on the check)

\_\_\_\_\_  
**Institution or School mailing address 1**

\_\_\_\_\_  
**Institution or School mailing address 2**

\_\_\_\_\_  
**City**

\_\_\_\_\_  
**State**

\_\_\_\_\_  
**ZIP Code**

## 7 Sign the form

By signing below, I certify that the information contained in this form is true, complete and correct. I authorize a withdrawal from my account based on this information. I have received the **Program Details Booklet** with respect to tax consequences of such a withdrawal and my record keeping obligations, and understand and agree to all terms as presented here and in the **Program Details Booklet**.

If I am making contributions by payroll deduction, I understand that my payroll contributions will continue into this Account, regardless of the amount withdrawn, unless I notify my employer to stop my payroll deduction, or I submit an updated **Payroll Deduction Form** to reallocate payroll contributions among my other Account(s), if any.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner. If I am an individual acting in a legal capacity as a representative of the Account Owner, or an Entity Account Owner, a Medallion Signature Guarantee appears below.

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Signature of Account Owner/Custodian/Authorized Representative  
of Entity

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Date (mm/dd/yyyy)

## 8 A 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. You may be required to provide proof of your authority to act on behalf of the DreamAhead account.
- 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 **Program Details Booklet**.

\_\_\_\_\_  
Signature of Account Owner/Custodian/Authorized Representative of Entity

\_\_\_\_\_  
Signature Guarantor

\_\_\_\_\_  
Title

\_\_\_\_\_  
Name of Institution

\_\_\_\_\_  
Date (mm/dd/yyyy)

**Have the Authorized Officer stamp here**

## Appendix – DreamAhead Investment Portfolio Options

For descriptions and details about all of these portfolio options, please go online to [www.DreamAhead.wa.gov](http://www.DreamAhead.wa.gov) or see the **Program Details Booklet** for important information including descriptions, details, and risks about the investment options before making a decision.

### Static Portfolios

Code	Portfolio Name
WACCP	Cash Preservation Portfolio
WACIN	Income Portfolio
WACCG	Income & Growth Portfolio
WACBA	Balanced Portfolio
WACMG	Conservative Growth Portfolio
WACGR	Moderate Growth Portfolio
WACAG	Growth Portfolio

### Year of Enrollment

#### Conservative

Code	Portfolio Name
WAC38	Year of Enrollment 2038 - Conservative
WAC36	Year of Enrollment 2036 - Conservative
WAC34	Year of Enrollment 2034 - Conservative
WAC32	Year of Enrollment 2032 - Conservative
WAC30	Year of Enrollment 2030 - Conservative
WAC28	Year of Enrollment 2028 - Conservative
WAC26	Year of Enrollment 2026 - Conservative
WAC24	Year of Enrollment 2024 - Conservative
WAC22	Year of Enrollment 2022 - Conservative
WACEC	College Enrolled Conservative

## Moderate

Code	Portfolio Name
WAM38	Year of Enrollment 2038 - Moderate
WAM36	Year of Enrollment 2036 - Moderate
WAM34	Year of Enrollment 2034 - Moderate
WAM32	Year of Enrollment 2032 - Moderate
WAM30	Year of Enrollment 2030 - Moderate
WAM28	Year of Enrollment 2028 - Moderate
WAM26	Year of Enrollment 2026 - Moderate
WAM24	Year of Enrollment 2024 - Moderate
WAM22	Year of Enrollment 2022 - Moderate
WACEM	College Enrolled Moderate

## Growth

Code	Portfolio Name
WAA38	Year of Enrollment 2038 - Growth
WAA36	Year of Enrollment 2036 - Growth
WAA34	Year of Enrollment 2034 - Growth
WAA32	Year of Enrollment 2032 - Growth
WAA30	Year of Enrollment 2030 - Growth
WAA28	Year of Enrollment 2028 - Growth
WAA26	Year of Enrollment 2026 - Growth
WAA24	Year of Enrollment 2024 - Growth
WAA22	Year of Enrollment 2022 - Growth
WACEA	College Enrolled Growth