PO Box 66945, 11545 W. Touhy Avenue, Chicago, IL 60666-0945 p: 800-328-1935 **alliantcreditunion.com**

ALLIANT

# Coverdell Education Savings Account (ESA) Rollover Authorization

**Notice:** Effective December 5, 2018, Alliant stopped offering new ESAs. If you already had an Alliant ESA before that date, you may continue to make deposits into that account (including rollovers). All IRS guidelines regarding allowable deposit amounts and rollover frequency must be adhered to. Only one (1) rollover is allowed per 365 days.

_____ _____ $ _____
ESA owner's name (member) member account number amount of rollover

**(Irrevocable Tax Treatment)**
The rollover deposit must be made to the account within 60 days from the date you withdrew funds from your Coverdell ESA. Alliant must receive this form within 30 days following the date of the deposit, or the funds will be withdrawn and returned to you.

This rollover contribution is all or part of a distribution from another Coverdell ESA which was disbursed during the past 60 days. During the last 12 months, I have not received any assets from this account which I subsequently rolled over to another Coverdell ESA.

**Only 1 Rollover is allowed per 365 days.**

_____ _____
ESA Responsible Individual's signature (required) date

**Return completed form to Alliant:**

**Mail to:**
Alliant Credit Union
Attn: IRA Services
11545 West Touhy Avenue
Chicago, IL 60666

**Fax to:**
773-462-8735