



**State Street Bank and Trust Company Coverdell Education Savings Custodial Account
Transfer of Education Savings Account Assets Form**

If you do not have a First Eagle Coverdell IRA account, a Coverdell Account Application must accompany this form.

1. Name, address and consent of person who controls the sending account

Mother Father Guardian*
*If "guardian," submit proof of guardianship.

Name

Social Security Number

Address

(_____) _____
Daytime Telephone Number

City

State

Zip

By signing below, I authorize and direct the current custodian or trustee to make the transfer specified in this form.

Signature

Date

SIGNATURE GUARANTEE (only if required by current custodian or trustee; signature guaranty by a notary public is NOT acceptable)

Signature guaranteed by:

Name of Bank or Dealer Firm

Signature of Officer and Title

2. Name of Student Benefiting

(Insert the name of the Student benefiting under the State Street Bank and Trust Company Education Savings Account, as specified in Section 1 of the State Street Bank and Trust Company Coverdell Education Savings Custodial Account Adoption Agreement.)

Name _____

Address _____

Street

City

State

Zip

Day Telephone No. (____) _____

Social Security No. _____

3. Instructions to Current Education Savings Account Custodian or Trustee

Current Account No. _____

Phone Number _____

Name of Custodian/Trustee _____

Attn: Mr./Ms. _____

Address _____

Street

City

State

Zip

Please transfer assets from the above account to State Street Bank and Trust Company. Transfer should be in cash according to the following instructions:

() Liquidate the total amount in this Account.

or () Liquidate \$ _____ and retain the balance.

