



Contribution Form

Use this form to make contributions to an ABLEnow Account. For assistance, please call ABLEnow Customer Service at 1-844-NOW-ABLE (or 844-669-2253). (Monday-Friday, 8AM to 5PM ET).

Step 1: Account Owner Information

*Required Fields

*Account Owner Name (First, MI, Last)

*ABLEnow Account number

*Permanent Address

*City

*State

*Zip Code

*Social Security Number

Step 2: Contributor Information (if different than Account Owner)

*Required Fields

*Contributor Name (First, MI, Last)

*Telephone

*Permanent Address

Email Address

*City

*State

*Zip Code

Step 3: Contribution Information (Please select one of the following)

*Contribution Amount:

*Contribution Type:

Additional Contribution (Select this option if you are making a new contribution by check)

OR

Rollover from another ABLE program

(Select this option if you are rolling all the assets from the above-named Account Owner's other ABLE program into his/her ABLEnow Account OR from another ABLE program account owned by above-named Account Owner who qualifies as a "Member of the Family"). Assets redeemed from another ABLE program must be deposited within 60 days of the withdrawal. The above-named Account Owner or his/her Authorized Representative must also open an ABLEnow Account in which to deposit these funds. You must provide a statement from the former program certifying the breakdown of basis and earnings of the amount being deposited. Until such statement is provided, ABLEnow will treat the entire deposit as earnings. You **must** complete the following if you have selected this contribution type.

*\$ _____
Total Amount of Withdrawal from the Former ABLE plan

*\$ _____
Basis Amount of Withdrawal

*\$ _____
Earning Amount of withdrawal

Please make check payable to: PNC Bank FBO (Account Owner Name and Account Number). You must mail the check with this completed ABLEnow Account Contribution Form as well as a statement from a former ABLE program, if applicable to: ABLEnow Customer Service, PO Box 2765, Fargo, ND 58108-2765. Please include only one check with each Contribution Form.



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Step 4: Authorization

I certify that I am the individual making this contribution and have the authority to do so. I have read and understand the instructions and any rules or conditions relating to this contribution and have met the requirements for making this transaction including those found in the ABLEnow Program Description and Custodial Account Agreement. All information provided by me is true and correct and may be relied upon by ABLEnow and the Account Custodian.

Additional Authorization For Rollovers Only: If I have chosen rollover as the contribution type, by signing below I make an irrevocable election to treat this transaction as such. I certify that there has not been a rollover from one ABLE program to another ABLE program for the above-named Account Owner during the prior 12-month period. If I am rolling over assets from another ABLE program account owned by someone other than the above-named Account Owner, I certify that the account in the other ABLE program is owned by the above-named Account Owner's sibling who qualifies as a "Member of the Family". I further certify that if I have already withdrawn the rollover amount for deposit into an ABLEnow Account, this request is within 60 days of the withdrawal and the account in the other ABLE program has been or will be closed as I can only own one ABLE account nationwide.

*Contributor Signature

*Date

Please call ABLEnow Customer Service at 1-844-NOW-ABLE (or 844-669-2253) with any questions (Monday-Friday 8AM – 5PM ET) or see the free IRS Publication 907, Tax Highlights for Persons with Disabilities (available from the IRS Website at www.irs.gov) or consult your tax advisor or attorney.

IMPORTANT INFORMATION:

This ABLEnow Account is a savings trust account with PNC Bank serving as the custodian. Terms and conditions of the ABLEnow Account are included in your ABLEnow Program Description and Custodial Account Agreement, ABLEnow Debit Card Agreement, ABLEnow Consent to Electronic Communications, and ABLEnow Account Fee Schedule. Contributions to an ABLEnow Account are held in an interest-bearing portion of the savings trust account at PNC Bank and are insured by the Federal Deposit Insurance Corporation (FDIC) up to the maximum amount permitted under FDIC guidelines.