



Use this form to transfer your Coverdell Education Savings Account assets to a Lord Abbett Coverdell Education Savings Account.

Make check(s) payable to: Lord Abbett Funds (Please include student's name, Social Security number, and account number.)

- **Please forward a copy of a current account statement of the account you wish to transfer to Lord Abbett.**
- **A complete Coverdell Education Savings Account Application is also required for all new accounts.**
- Retain a photocopy of this Coverdell Education Savings Account Transfer Form for your records.

Mail completed form to: Lord Abbett Service Center, PO Box 219336, Kansas City, MO 64121-9336
Overnight Mail: Lord Abbett Distributor LLC, 330 West 9th Street, Kansas City, MO 64105-1514
If you have any questions, please call us: 888-522-2388 (Monday–Friday, between 8:30 a.m. and 6:00 p.m. Eastern Time)

STEP 1: STUDENT INFORMATION

Student Name (First Name, MI, Last Name) _____ Social Security Number _____ / /
 Date of Birth (MM/DD/YYYY)

Street Address (P.O. boxes not accepted) _____ City _____ State _____ Zip Code _____

Email Address _____ Daytime Phone Number _____

STEP 2: INVESTMENT PROFESSIONAL'S INFORMATION (This section to be completed by broker/dealer.)

Investment Professional's Name _____ Investment Professional's Phone Number (required) _____

Investment Professional's Dealer Firm _____ Investment Firm's Phone Number (if different from above) _____

Branch/Agency _____ Branch Number _____

Branch Street Address _____ City _____ State _____ Zip Code _____

Investment Professional's Identification Number _____ Investment Professional's Signature _____

STEP 3: INVESTMENT INSTRUCTIONS

Please choose investment option A or B.

- A.** Invest proceeds in a new Lord Abbett account. (I have attached a completed Coverdell Education Savings Account Application.)
- B.** Invest proceeds in my existing Lord Abbett Coverdell Education Savings Account according to the following:

Lord Abbett Fund Name(s)	Account Number	Dollar Amount or Whole Percentage (Total must equal 100%)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

STEP 7. CUSTODIAN ACCEPTANCE

UMB Bank agrees to accept the transfer of the above amount for deposit to the Student's UMB Bank Coverdell Education Savings Custodial Account, and requests the liquidation and the transfer of assets as indicated above.

UMB Bank, Custodian Signature

STEP 8. CUSTODIAN ACCEPTANCE

All non-Lord Abbett funds must be liquidated before transfer. Send completed and signed Coverdell Education Savings Account Transfer Form to:

Regular Mail: Lord Abbett Service Center, PO Box 219336, Kansas City, MO 64121-9336

Overnight Mail: Lord Abbett Distributor LLC, 330 West 9th Street, Kansas City, MO 64105-1514

Make check(s) payable to: **Lord Abbett Funds**. Please indicate the Lord Abbett fund, account number, and Social Security number of the Coverdell Education Savings Account holder on all documents.