



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:** 888-522-2388 (Monday—Thursday between 8:30 a.m.–6:00 p.m. ET and Friday between 8:30 a.m.–4:00 p.m. ET)

**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.