

# TOMORROW'S SCHOLAR® Rollover Reimbursement Form



Complete this form to request a reimbursement for fees charged by your prior 529 plan provider due to your rollover into a Tomorrow's Scholar account. If you would like help completing this application, contact your financial advisor or call **1-866-677-6933**. Information is also available online at **www.tomorrowsscholar.com**.

## 1 ACCOUNT INFORMATION

Name of Account Owner/Custodian (first, middle initial, last)		Social Security/taxpayer ID number	
If trust, name of trustee(s) (first, middle initial, last)		Date of trust (mm/dd/yyyy)	
U.S. residential street address	City	State	ZIP code
U.S. mailing address (if different than U.S. residential street address)	City	State	ZIP code
E-mail address	Daytime phone	Evening phone	
Name of designated Beneficiary (first, middle initial, last)		Social Security/taxpayer ID number	
U.S. residential street address	City	State	ZIP code
Option and account number			

To help ensure timely and accurate processing of this form, please print clearly.

## 2 REQUEST FOR REIMBURSEMENT

To qualify for a reimbursement of your rollover fees, your rollover must total \$25,000 or more.

I confirm that my rollover totals \$25,000 or more.

Note: There is a reimbursement limit of \$75 per account.

**In order to process your request, you must submit a confirmation statement or letter on company letterhead from the previous plan administrator indicating the total rollover fees charged by your prior plan.**

I request reimbursement of rollover fees in the amount of \$ \_\_\_\_\_.

Please note that the fees will be reimbursed to you as a contribution into your Tomorrow's Scholar account after this form is processed and all requirements are met. Please allow 30 to 60 days for processing.

## 3 MAILING INSTRUCTIONS

### REGULAR MAIL

Tomorrow's Scholar  
c/o Voya Investment Management  
PO Box 9883  
Providence, RI 02940-9984

### OVERNIGHT/COURIER

Tomorrow's Scholar  
c/o Voya Investment Management  
4400 Computer Drive  
Westborough, MA 01581-1722

Tomorrow's Scholar is a state-sponsored 529 plan administered by the State of Wisconsin. Voya Investment Management Co. LLC provides investment management and administrative services for the Tomorrow's Scholar Plan. Shares in the Program are distributed by Voya Investments Distributor, LLC, Member FINRA/SIPC.



NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE