

Important information about this form:

- Use a **Rollover Form** to transfer assets from this STABLE account to another eligible Beneficiary.
- An IRS Form 1099-QA is filed when a withdrawal is made from the STABLE account.
- Please provide a certified copy of a Death Certificate and either a Letter of Testamentary or a Small Estates Affidavit to the individual providing the notarization acknowledgement.
- Please send in copies of a Death Certificate and either a Letter of Testamentary or a Small Estates Affidavit to the individual providing the notarization acknowledgement.
- Type or print clearly in black ink, and do not staple the pages or copies of documents included with this form.

Need help?

Give us a call Monday – Friday
from 9am – 8pm ET at
1-800-439-1653

Individuals with speech or hearing disabilities may dial **711** to access Telecommunications Relay Service (TRS) from a telephone or TTY.

Mail the form to:

STABLE Account Plan
PO Box 534425
Pittsburgh, PA 15253-4425

Overnight Mail:

STABLE Account Plan
Attention: 534425
500 Ross Street, 154-0520
Pittsburgh, PA 15262

Fax:

844-745-9612

1 STABLE account information

Name of the Beneficiary on the STABLE account (First and last)

____ - ____ - _____
Beneficiary's Social Security or Taxpayer Identification Number

S T - _____
STABLE account number

2 Executor information

Name (First and last)

___ / ___ / _____
Date of birth (mm/dd/yyyy)

____ - ____ - _____
Social Security or Taxpayer Identification Number

5 A notarization acknowledgement is required for the death of a Beneficiary

Please provide a certified copy of a Death Certificate and either a Letter of Testamentary or a Small Estates Affidavit to the individual providing the notarization acknowledgement.

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You can get a notarization acknowledgement from an authorized officer of a bank, broker, or other qualified financial institution. You may be required to provide proof of your authority to act on behalf of the STABLE account.
- Only sign if you are in the presence of an authorized notary providing the notarization acknowledgement.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the **Plan Disclosure Statement & Participation Agreement**.

The undersigned has read the foregoing in its entirety before signing. IN WITNESS WHEREOF, I have hereunto

set my hand this _____ day of _____, 20____.

Day (#) Month Year

Signature of Executor

State of _____, County of _____

This instrument was acknowledged before me

physical presence online notarization

on _____
Date (mm/dd/yyyy)

by _____
Name of person (First and last)

My term expires: _____
Date (mm/dd/yyyy)

Notary Public (Seal)

Signature of Notary Public