



# Florida Prepaid College Plan Transfer Form

### Customer Information:

\_\_\_\_\_  
Name of Current Account Owner or Authorized Representative Of Business/Organization/Trust

(\_\_\_\_\_) - \_\_\_\_\_ - \_\_\_\_\_  
Daytime Telephone Number

\_\_\_\_\_  
Plan Number

\_\_\_\_\_  
Name of Beneficiary (Student)

This authorization applies to all plans you own for this beneficiary.

**PLEASE NOTE: Only one Transfer Form is needed each time the beneficiary begins attendance at an out-of-state or private school. You do not need to submit a separate Transfer Form for any supplementary plans.**

Following is information about using your prepaid plan(s) at an out-of-state college, private Florida college, or other eligible educational institution.

**ELIGIBLE EDUCATIONAL INSTITUTIONS:** The Florida Prepaid College Plan may be used at any eligible educational institution as defined in s. 529 of the Internal Revenue Code. To view a list of eligible institutions, visit [www.myfloridaprepaid.com/what-we-offer/schools](http://www.myfloridaprepaid.com/what-we-offer/schools). By completing this form, you accept responsibility for verifying that you are requesting payment of your prepaid plan benefits to an eligible institution.

To transfer the benefits of a prepaid plan, the *account owner or beneficiary* must complete and mail this form to: Florida Prepaid College Plan, PO Box 6567, Tallahassee, FL 32314-6567. Or FAX to: 850-309-1766. Please allow up to four weeks for processing. If you have any questions, please call us at 1-800-552-GRAD (4723) and *press prompt 2*.

**PAYMENT OPTIONS:** Select one of the payment options listed below.

\_\_\_ **RESTRICTED PAYMENT OPTION** -- I authorize the Florida Prepaid College Plan to transfer my prepaid plan(s) to the educational institution listed below. The Prepaid Plan will not be responsible for any balance due. I understand:

- If invoiced for the tuition and fees by dollar amount only, the Florida Prepaid College Plan will pay a dollar amount up to the average rate payable for 15 credit hours at Florida's public colleges or universities under the beneficiary's plan.

**OR**

- If invoiced for the tuition and fees by credit hour and dollar amount, the Florida Prepaid College Plan will pay the total number of credit hours invoiced at the average rate payable for a credit hour at Florida's public colleges or universities under the beneficiary's plan.

\_\_\_ **UNRESTRICTED PAYMENT OPTION** – I authorize the Florida Prepaid College Plan to transfer my prepaid plan to the educational institution listed below. The Prepaid Plan will not be responsible for any balance due. I understand:

- The Florida Prepaid College Plan will pay the total dollar amount invoiced up to the total plan value. By selecting this option, I may deplete my prepaid plan at a much faster rate because out-of-state colleges and private Florida colleges are usually more expensive.

If you have a dormitory plan, the Florida Prepaid College Plan will pay one semester of dormitory per term at the average dormitory rate payable to Florida's public colleges or universities under your prepaid plan or the actual amount invoiced by the school, whichever is less.

The college listed below must submit an invoice to the Florida Prepaid College Plan each semester. The Prepaid Plan will send payment instructions to the college you have selected and will pay the college directly until your prepaid plan is depleted.

\_\_\_\_\_  
Name of College or Educational Institution

\_\_\_\_\_  
City and State

\_\_\_\_\_  
Signature of Account Owner or Beneficiary (Required)

\_\_\_\_\_  
Print Name (Required)

\_\_\_\_\_  
Date