

# Coverdell Education Savings Account Transfer Form

Mail to: Mairs & Power Funds  
 c/o U.S. Bank Global Fund Services  
 PO Box 701  
 Milwaukee, WI 53201-0701

Overnight Express Mail To: Mairs & Power Funds  
 c/o U.S. Bank Global Fund Services  
 615 E. Michigan St., FL3  
 Milwaukee, WI 53202-5207

Please use this form to transfer assets from an existing Coverdell Education Savings Account to a(n) Mairs & Power Funds Coverdell Education Savings Account. If you are opening a new Coverdell Education Savings Account for this transfer, please complete a Coverdell Education Savings Account Application. Once completed, mail this application to the address above.

**PLEASE PRINT ALL ITEMS EXCEPT SIGNATURE(S) AND BE SURE TO SIGN SECTION 5 OF THIS FORM.**

## 1 Name, Address and Consent of Person Who Controls the Current Account

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>GUARDIAN FIRST NAME</i>	<i>M.I.</i>	<i>LAST NAME</i>	<i>SOCIAL SECURITY NUMBER</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>DATE OF BIRTH</i>	<i>MAILING ADDRESS</i>	<i>CITY / STATE / ZIP</i>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>EMAIL ADDRESS</i>	<i>DAYTIME PHONE NUMBER</i>		<i>EVENING PHONE NUMBER</i>
<input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Guardian			

## 2 Name of Beneficiary (For Whom the Coverdell Education Savings Account is Benefiting)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>FIRST NAME</i>	<i>M.I.</i>	<i>LAST NAME</i>	<i>SOCIAL SECURITY NUMBER</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<i>DATE OF BIRTH</i>	<i>MAILING ADDRESS</i>	<i>CITY / STATE / ZIP</i>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>EMAIL ADDRESS</i>	<i>DAYTIME PHONE NUMBER</i>		<i>EVENING PHONE NUMBER</i>

## 3 Instruction to Current Coverdell Education Savings Account Custodian or Trustee

<input type="text"/>	<input type="text"/>
<i>CURRENT ACCOUNT NUMBER</i>	<i>NAME OF CUSTODIAN/TRUSTEE</i>
<input type="text"/>	<input type="text"/>
<i>MAILING ADDRESS</i>	<i>CITY / STATE / ZIP</i>

Please transfer assets from the above account to U.S. Bank, NA. Transfer should be in cash according to the following instructions:

- Transfer the total amount in this Account.
- Transfer \$\_\_\_\_\_ or \_\_\_\_\_ shares and retain the balance.

Make check payable to: Mairs & Power Funds FBO

*BENEFITING STUDENT'S NAME*

## 4 Fund Selection

A Mairs & Power Funds Coverdell Account Application must be completed to process this transfer if a new account is being established. The Fund(s) and the allocation(s) specified on the Application will be used if they are different from those indicated below.

	NEW	EXISTING	ACCOUNT # (IF APPLICABLE)	AMOUNT	OR	%
<input type="checkbox"/> Mairs & Power Growth Fund 248	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	OR	<input type="text"/>
<input type="checkbox"/> Mairs & Power Balanced Fund 249	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	OR	<input type="text"/>
<input type="checkbox"/> Mairs & Power Small Cap Fund 250	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	OR	<input type="text"/>

The undersigned acknowledges having sole responsibility for the foregoing investment choices and having received a current prospectus for each Fund selected. Please read the prospectus(es) for the Mairs & Power Funds selected, including the privacy notice. The undersigned understands that the requirements for a valid transfer between Coverdell Education Savings Accounts are complex and acknowledges having responsibility for complying with all requirements and for the tax results of any such transfer.

## 5 Signature of Student, Parent or Guardian

I certify that I have established a Coverdell Education Savings Account with the Mairs & Power Growth, Balanced or Small Cap Funds, of which U.S. Bank, NA, is the Custodian. I agree to contact my present Custodian from whom I am transferring to determine if specific documentation or a signature guarantee is required. I understand that I am responsible for determining my eligibility for all transfers. I agree to hold the Custodian harmless against any and all situations arising from an ineligible transfer. I acknowledge that the Custodian or its agent cannot provide legal advice and I agree to consult with my own tax professional for advice.

I authorize U.S. Bank Global Fund Services, to act on my behalf in contacting the current custodian or plan administrator to facilitate the transfer of assets.

<input checked="" type="checkbox"/>	<input type="text"/>
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SIGNATURE OF STUDENT / PARENT / GUARDIAN (PLEASE CIRCLE ONE)

DATE (MM/DD/YYYY)

**SPECIAL NOTE:** If Student is a minor under the law of Student's state of residence, the parent or guardian must execute this Coverdell Education Savings Account Transfer of Assets Form.

SIGNATURE GUARANTEE (only if required by current custodian or trustee) A signature guarantee may be obtained from a bank, a member of a national securities exchange, savings and loan associations, credit union, broker, or other acceptable financial institutions. Please note that a Notary Public stamp or seal is unacceptable.

SIGNATURE GUARANTEED BY:

NAME OF BANK OR DEALER FIRM

\_\_\_\_\_  
SIGNATURE OF OFFICER AND TITLE

## 6 Acceptance by New Custodian

To be completed by U.S. Bank, NA.

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

Appointment as Custodian accepted:  
U.S. BANK, NA

*Joseph Nealy*

**For additional information please call toll-free 1-800-304-7404.**