

Coverdell Education Savings Account Asset Transfer Form



Use this form when transferring assets from an existing Coverdell Education Savings Account to an AIM Coverdell Education Savings Account. This form may also be used to change the beneficiary on an existing AIM Coverdell Education Savings Account.

- This form is not to be used for Traditional IRA or Roth IRA transfers or conversions.
- If you have not already established an AIM Coverdell Education Savings Account, you must also submit an AIM Coverdell Education Savings Account Application.

PLEASE USE BLUE OR BLACK INK

PLEASE PRINT CLEARLY IN BLOCK CAPITAL LETTERS

1 Investor Information (Please print or type)

Full Name of Responsible Individual

Responsible Individual's SSN (Required)

 - -

Street Address (Including apartment or box number)

City

State

ZIP

Day Phone Number

 - -

Evening Phone Number

 - -

Full Name of Depositor

Depositor's SSN (Required to open account)

 - -

2 Beneficiary Information (Please print or type)

Full Name of Designated Beneficiary

Designated Beneficiary's SSN (Required)

 - -

Date of Birth of Designated Beneficiary

 / /

Check here if you wish to change the Beneficiary of an existing account. The new Beneficiary must be a member of the family [as defined by IRS Code Section 529(3)(2)] of the existing Beneficiary.

Full Name of New Beneficiary

New Beneficiary's relationship to current Beneficiary

Date of Birth of New Beneficiary

 / /

New Beneficiary's SSN

 - -

New Beneficiary's Home Phone

 / /

3 Current Trustee/Custodian (Please attach a copy of your most recent statement)

Full Name of Current Trustee/Custodian

Account Number of Current Trustee/Custodian

Street Address of Current Trustee/Custodian

City

State

ZIP

Attention

Trustee/Custodian Phone Number

Transfer Instructions

If the account listed above contains shares of an AIM fund, you may choose to transfer them "in kind." To transfer all other assets, they must be liquidated.

OPTION 1: Please liquidate from the account(s) listed above and issue a check payable to INTC (Invesco National Trust Company).

Amount to liquidate: all partial amount of \$, .

When to liquidate: immediately at maturity / /

OPTION 2: Please transfer "in kind" to Invesco National Trust Company the AIM funds held in the account listed above.

Amount to transfer "in kind" immediately: all

Partial Transfer of \$, . or _____ shares of AIM _____ Fund

4 Coverdell Education Savings Account Investment Instructions

Please deposit proceeds in my

New Coverdell Education Savings Account Existing AIM Coverdell Education Savings Account Number

INVESTMENT ALLOCATION:

Fund Number	Fund Name	Class of Shares	Amount
<input type="text"/>	_____	<input type="text"/>	\$ _____
<input type="text"/>	_____	<input type="text"/>	\$ _____
<input type="text"/>	_____	<input type="text"/>	\$ _____

Initial Purchase Total* \$ _____

**Your initial purchase should equal the amount enclosed*

*If no class of shares is selected, Class A shares will be purchased, except in the case of AIM Money Market Fund, where AIM Cash Reserve Shares will be purchased.

5 Authorization and Signature

A Coverdell Education Savings Account has been established with Invesco Aim Distributors, Inc. and Invesco National Trust Company (INTC) has been appointed as the successor Custodian. I, the undersigned, give my authorization to liquidate or transfer "in kind" the assets noted above, which your company holds for the above-named Designated Beneficiary.

Signature of Responsible Individual

Date (mm/dd/yyyy)

Note: The current trustee or custodian may require your signature to be guaranteed. Call that institution for their requirements.

Signature Guarantee:

(Please place Signature Guarantee stamp here.)

Each signature must be guaranteed by a bank, broker-dealer, savings and loan association, credit union, national securities exchange or any other "eligible guarantor institution" as defined in rules adopted by the Securities and Exchange Commission. Signatures may also be guaranteed with a medallion stamp of the STAMP program or the NYSE Medallion Signature Program, provided that the amount of the transaction does not exceed the relevant surety coverage of the medallion.

A signature guarantee may NOT be obtained through a notary public.

6 Custodian Acceptance (This section to be completed by Invesco Aim)

This is to advise you that Invesco National Trust Company, as Custodian, will accept the account identified above for:

Depositor's Name

Account Number

This transfer of assets is to be executed from fiduciary to fiduciary and will not place the participant in actual receipt of all or any of the plan assets. No federal income tax is to be withheld from this transfer of assets.

Authorized Signature

On behalf of Invesco National Trust Company

Mailing Date (mm/dd/yyyy)

7 Instructions to Current Trustee/Custodian

Submit form to:

After completing the form, please sign it and send it to one of the addresses detailed below.

(Direct Mail)

Invesco Aim Investment Services, Inc.
P.O. Box 4739
Houston, TX 77210-4739

(Overnight Mail)

Invesco Aim Investment Services, Inc.
11 Greenway Plaza, Ste. 100
Houston, TX 77046

For additional assistance please contact an Invesco Aim Client Services Representative at 800-959-4246, weekdays, 7 a.m. to 6 p.m. Central Time.

Please indicate the fund, account number and Social Security number of the Beneficiary on all documents.