



## Withdrawal Request

To withdraw available funds from your Upromise account, please complete and send it to:

**Upromise, Inc.,**  
**ATTN: Customer Care**  
**PO Box 55555**  
**Boston, MA 02205-5555**

or

**Fax this form to:**  
**617-559-2481**

Please provide the following information. Don't forget to print legibly.

Full Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Upromise Account Number: \_\_\_\_\_

Signature: \_\_\_\_\_

Please select one of the following options:

Withdraw my total available balance (do not close my Upromise account)

Withdraw a partial amount \$ \_\_\_\_\_

Withdraw all available funds from my account and close my Upromise account

If your withdrawal request is for more than \$300, we require that your letter either be notarized or contain a Signature Guarantee. A Signature Guarantee is a guarantee you can obtain from a financial institution, such as your bank, verifying the validity of your signature. **Your request will not be processed by fax if either a Signature Guarantee or notary is needed.**

Checks are sent once per calendar quarter. You should expect to receive your check within 12 weeks.

To find your Upromise account number, click on My Account on the upper left hand side of the Upromise website. Log into your account and you will see your account number on the upper left-hand side of the page, just beneath your name. Upromise will process one withdrawal request per calendar quarter.

**Please note:** This withdrawal form cannot be used to request a withdrawal from a Upromise-affiliated 529 Plan.