

Use this form to request a Withdrawal from your SOAR Scholars Invest529SM Account.

BEFORE YOU BEGIN

- Review the Invest529 Withdrawal Guide. Keep in mind that for the SOAR Scholars program, Virginia529 is the Account Owner and the Scholar is the Beneficiary (Student).
- Virginia529 is not responsible for payment of any higher education expenses that exceed the Invest529 Account balance at the time of the Withdrawal request.
- For tax purposes, it's strongly recommended that you maintain documentation showing your withdrawn funds were used for Qualified Higher Education Expenses.

Note: Current graduates can submit this form starting July 1, after being enrolled at their college/university or apprenticeship program.

SECTION 1 | Account Information

Virginia529

Account Owner Name

10232028

Invest529 Account Number

Scholar Name

Student Identification Number (issued by school)

Scholar Email Address

SECTION 2 | Payee Information

School Name

Select One: College/University Apprenticeship*

* SOAR Scholars are responsible for providing documentation about the apprenticeship program to Virginia529. Once received and verified, a check will be mailed to the Scholar's address on file.

School Street Address

School City, State, Zip Code

SECTION 3 | Withdrawal Options

Select one of the following withdrawal options. Requesting the full amount, the Invest529 Account will be closed after the Withdrawal is made. Note: If multiple Withdrawals for a school are necessary, please submit a **new form for each Withdrawal**.

SELECT ONE:

Specific Amount \$ _____

Full Amount

SECTION 4 | Signature

In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA) and other applicable state and federal law, as the undersigned Scholar (Beneficiary) of the Invest529 Account designated above, I authorize Virginia529 and the school listed above to disclose to each other personally identifiable information, including the Scholar's Social Security number, Student Identification number and any other account or invoice information necessary to process Withdrawals. I further understand that all Withdrawals from SOAR Scholars Invest529 Accounts will be made subject to the Pending Settlement Period as described in the Invest529 Program Description and certify that I have read and understand the information disclosed in the Invest529 Withdrawal Guide, Invest529 Program Description and Virginia529 Privacy Policy. I certify that the information provided on this form is true and correct to the best of my knowledge. I understand that any Non-Qualified Withdrawals from the SOAR Scholars Invest529 Account may subject me to applicable federal and state taxes and penalties to be reported on my tax return.

Scholar Signature

Date

Your documents can be uploaded securely by using Virginia529's [Secure File Upload Link](#) or by mailing to the address below. Please do not send personal identification documents by return email.

Virginia529