







Please refer to these instructions when completing this application. To enroll online, visit [www.myfloridaprepaid.com/SignUpToday](http://www.myfloridaprepaid.com/SignUpToday).

1. To enroll in the **FLORIDA COLLEGE INVESTMENT PLAN**, you must:
  - Complete **all** sections on this application.
  - Select investment option(s) by indicating how you want to allocate your contributions in Section 4.
  - Submit a check or money order, **made payable to: Florida College Investment Plan**, for the \$50 application fee\*, PLUS an initial contribution of at least \$250. **Or**, submit a check or money order for the \$50 application fee\* **AND** authorize automatic contributions of at least \$25 per month in Section 5C.
  - Initial and sign the application in Section 7.

\* If you have a Florida Prepaid College Plan for the same beneficiary (student), the application fee to add a Florida College Investment Plan is \$30.
2. To make a **ROLLOVER CONTRIBUTION** to the Florida College Investment Plan, you **MUST** submit the rollover contribution and the appropriate documentation (see below) showing both the principal amount and the earnings portion of the contribution.
  - Another 529 Plan: Statement issued by the distributing 529 program.
  - Coverdell Education Savings Account: Statement issued by the financial institution that acted as trustee or custodian of the account.
  - Qualified U.S. Savings Bond: Statement or Form 1099-INT issued by the financial institution that redeemed the bond.
  - UTMA/UGMA: Certified copy of document establishing the account.
3. If you are opening a Florida College Investment Plan on behalf of a **BUSINESS, ORGANIZATION OR TRUST**, you **MUST** submit the official title of the authorized representative and documentation substantiating the legal status of the entity opening the account:
  - For a corporation, association or partnership: Certificate of status or existence.
  - For a not-for-profit organization, including corporations and associations: IRS letter granting not-for-profit status.
  - For a trust: Trust documents establishing the trust and identifying the grantor and trustee.
  - For an estate: Certified copy of letters of administration issued by the appropriate court.
  - For an UTMA/UGMA account: Certified copy of document establishing the account.
  - For a state or local government agency: A request on the agency's letterhead to open an account.
4. All information is required unless the information requested is not applicable to you or is designated as "Optional."
5. Your application and check or money order will be returned to you if (1) you do not initial and sign the application; (2) you do not include the account owner's social security number or tax identification number; (3) you do not include the beneficiary's social security number; (4) you do not select investment option(s) or your total allocation does not equal 100 percent; (5) you select the Age Based/Years to Enrollment Investment Option, but do not provide the beneficiary's date of birth or projected college enrollment year; (6) you are opening an account on behalf of a business, organization or trust, but do not submit documentation substantiating the legal status of the entity; or (7) you are funding your Florida College Investment Plan with a rollover, but do not submit the rollover contribution and documentation showing both the principal amount and the earnings portion of the contribution. If your application is incomplete for any other reason, you will receive a correction letter requesting the missing information. If your check is returned for insufficient funds, you will be charged a \$20 insufficient funds fee.
6. Return your completed application, check or money order, and any required documentation to: **Florida College Investment Plan, P.O.Box 6448, Tallahassee, FL 32314-6448**. You will receive written confirmation within four weeks.
7. Please refer to the Enrollment Kit for information about the Florida College Investment Plan options, features and policies.

**For information or assistance, call 1-800-552-GRAD (4723) or visit [www.myfloridaprepaid.com](http://www.myfloridaprepaid.com).**