

CalKIDS Forfeiture of Funds Form

Please complete this form if you would like to forfeit funds from your CalKIDS Account.

Instructions

- If you do not have, or will not have, qualified higher education expenses at an Eligible Educational Institution¹, you can irrevocably forfeit funds in your CalKIDS Account at any time by completing this form and submitting it to CalKIDS. Forfeited funds will be transferred to the State of California. **Once funds are forfeited, they cannot be used by you for any purpose.**
- You are under no obligation to forfeit funds. Funds will automatically be forfeited if they are not disbursed to an Eligible Educational Institution before you turn 26 years of age.
- **Do not use this form to withdraw funds to pay any qualified higher education expenses.** Visit **CalKIDS.org** to request payment directly to an Eligible Educational Institution.
- You must provide all the requested information and your signature on this form.
- You must print, hand sign or digitally sign this document, and mail this completed form to ScholarShare Investment Board, Attention: CalKIDS, PO Box 942809, Sacramento, CA 94209-0001.

Questions? Visit www.calkids.org or call toll-free 888-445-2377 for information or assistance.

1. Current CalKIDS Beneficiary Information

Complete the information below to identify the CalKIDS Beneficiary:

CalKIDS Beneficiary First Name CalKIDS Beneficiary Middle Name (if applicable) CalKIDS Beneficiary Last Name

Parent/Legal Guardian Name (if Beneficiary is under the age of 18) CalKIDS Beneficiary Date of Birth

Email Address

Phone Number

For newborns, please fill out this section:

Newborn Local Registration Number (LRN)

County of Birth

For students, please fill out this section:

Statewide Student Identifier (SSID)

County of School, as of applicable Fall Academic Census Date²

²Fall Academic Census Day is a day within the Academic Year on which an official count is taken. The Fall Census Day is the first Wednesday in October. Students identified in 1st - 12th grade in 2021-22 should use the county as of their school attendance on October 6, 2021. Students identified in 1st grade in subsequent years should use the county as of the applicable Fall Academic Census Day.

2. Forfeiture of Funds Request

Please proceed with the following request:

Forfeiture of remaining funds in my CalKIDS Account

Forfeiture of additional incentives* (Circle one or both) Homeless Foster

* Check this box if your designation as either a foster youth or homeless student is inaccurate.

3. Signature and Authorization

By signing below, I attest that I am a CalKIDS Beneficiary (award recipient, if 18 years of age or older) or the parent/legal guardian of a CalKIDS Beneficiary with authority to act on their behalf and that in such capacity I possess the legal right to request a forfeiture of funds and disclaim any program grants offered to me by the CalKIDS Program. I understand that with this attestation, my or my child's right to funds forfeited from the CalKIDS Program will terminate and will not be reinstated, and that I am under no obligation to forfeit these funds and that I have until my 26th birthday to use funds in my CalKIDS Account to pay qualified higher education expenses at an Eligible Educational Institution.

Under penalty of perjury and the laws of the state of California, I affirm that I am authorized to execute this attestation and declare that such authority and the statements made within it are true and correct.

I understand that the CalKIDS Program's reliance on this attestation is binding and final.

I further understand that false statements made in connection with this attestation may result in legal action.

Signature (Please print and hand sign or digitally sign this document)

Print Full Legal Name of CalKIDS Beneficiary or Parent/Legal Guardian

Date

All forms must be either hand signed or digitally signed.

Mail this completed form to:

ScholarShare Investment Board
Attention: CalKIDS
PO Box 942809
Sacramento, CA 94209-0001

Program Administered by the ScholarShare Investment Board



CalKIDS
The first step toward college

¹ An "Eligible Educational Institution" is defined in Section 529 of the Internal Revenue Code and is generally a postsecondary educational, vocational or proprietary institution that is eligible to participate in the Department of Education's Title IV Financial Aid Programs. You should check with your school, if any, to determine whether or not it participates in these financial aid programs before permanently forfeiting all rights to use the funds in your Student Scholarship Account. Qualified Higher Education Expenses are tuition and fees; costs of books, supplies and equipment required for the enrollment or attendance, and certain amounts for room and board.