



# Coverdell ESA Distribution Request

If you have any questions or concerns regarding this form, please call us at 1-800-728-8762.

Mail or fax completed forms to: **Saturna Capital**  
**P.O. Box N**  
**Bellingham, WA 98227-0596**  
**F: 360-734-0755**

**Mutual Fund Account Number****Brokerage Account Number****Grantor (Responsible Party)**

Mr.  Mrs./Ms.  Dr.

First Name

M.I. Last Name

**Date of Birth (MM-DD-YYYY)****Social Security or Tax ID Number****Physical / Street Address (required)**

City

State

Zip

**Designated Beneficiary**

First Name

M.I. Last Name

**Date of Birth (MM-DD-YYYY)****Social Security Number****Physical / Street Address (required)**

City

State

Zip

**Distribution Reason****Distributions for Qualified Education Expenses**

Distributions from this account are being used for qualified education expenses of the designated beneficiary

**Distributions Not Used for Education Expenses**

This Coverdell ESA is being rolled over or transferred to another Coverdell ESA (complete the Distribution Method section on the following page)

Removal of excess contribution plus earnings before deadline

Year of Contribution:

Is the Contribution being removed in the same year?  Yes  No

Permanent Disability of the designated beneficiary (as defined by section 72(m)(7) of the Internal Revenue Code)

Death (You are the representative of the Designated Beneficiary's estate and can furnish a certified copy of the Death Certificate)

Transfer (including transfer incident to divorce or legal separation) Payable to:



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## Distribution Instructions

Indicate below which Fund(s) you would like to sell shares of for your distribution.  
If you choose to sell a partial amount of shares, please **enter the dollar amount** in the box provided.

<input type="checkbox"/> Amana Growth Fund <i>Investor</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Sextant Growth	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
<input type="checkbox"/> Amana Growth Fund <i>Institutional</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Sextant International	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
<input type="checkbox"/> Amana Income Fund <i>Investor</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Sextant Core	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
<input type="checkbox"/> Amana Income Fund <i>Institutional</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Sextant Global High Income	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
<input type="checkbox"/> Amana Developing World Fund <i>Investor</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Sextant Short-Term Bond	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
<input type="checkbox"/> Amana Developing World Fund <i>Institutional</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Sextant Bond Income	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
<input type="checkbox"/> Amana Participation Fund <i>Investor</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Saturna Sustainable Equity	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
<input type="checkbox"/> Amana Participation Fund <i>Institutional</i>	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$	<input type="checkbox"/> Saturna Sustainable Bond	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$
				<input type="checkbox"/> Cash (or equivalent) from brokerage account	<input type="checkbox"/> Sell all shares	<input type="checkbox"/> Sell partial amount of shares	\$

## Distribution Method (For more information about ESA distributions, please refer to IRS Publication 970, Tax Benefits for Education.)

Check

ACH (Requires prior ACH authorization):

ABA Routing Number:

Account Number:

Transfer to:

Existing Saturna ESA Account:       -

Name of New Beneficiary:

New Saturna ESA Account (You must also include a completed Education Savings Account Application and IRS Form 5305-E)

Wire Transfer (Fee applies; \$5,000 minimum per fund, instructions required - please contact Saturna for additional information)

## Signatures

I certify that I am the proper party to direct payment(s) from this Coverdell Education Savings Account, and all information provided by me is accurate and true. I understand that distributions from this Coverdell Education Savings Account are reported to the IRS. Furthermore, I certify that no tax advice has been given to me by the Custodian or Trustee and that all decisions regarding this withdrawal are my own. I expressly assume the full responsibility of determining the taxable amount of this distribution and for any adverse consequences which may arise from this withdrawal. I agree that the Custodian or Trustee shall in no way be responsible for those consequences.

\_\_\_\_\_  
Grantor's Signature Date: \_\_\_\_\_

\_\_\_\_\_  
Custodian or Trustee Signature Date: \_\_\_\_\_