

CollegInvest Direct Portfolio College Savings Plan

Additional Purchase Form



- Complete this form to make additional contributions to your account by check.
- If you want to make an additional contribution by direct rollover from another 529 plan, complete an Incoming Rollover Form, which is available online at www.collegeinvest.org or by calling **800-997-4295**.
- For your contribution to be invested, you must clearly print all required information and include a check made payable to *CollegInvest Direct Portfolio College Savings Plan*. If not, your investment will be delayed until proper information is received. **Note:** Your contribution will be invested according to the allocation instructions on file for your account.
- Please include your account number on your check.
- Print clearly, preferably in capital letters and black ink.

You can download forms from our website at www.collegeinvest.org. Or you can call us to order any form at **800-997-4295** Monday through Friday from 6 a.m. to 7 p.m., Mountain time. Return this form along with a check and any other required documents in the enclosed postage-paid envelope or mail to: **CollegInvest Direct Portfolio College Savings Plan, P.O. Box 219931, Kansas City, MO 64121-9931**. For overnight delivery or registered mail, send to: **CollegInvest Direct Portfolio College Savings Plan, 1001 E 101st Terrace, Suite 200, Kansas City, MO 64131**.

(Include your account number on your check.)

Account Number

Name of Account Owner (first, middle initial, last)

Name of Beneficiary (first, middle initial, last)

Source of Funds (Complete A, B, or both.)

Contributions and rollovers by check won't be available for withdrawal for seven business days.

- A. **Personal check.** Make your check payable to *CollegInvest Direct Portfolio College Savings Plan*. The plan won't accept contributions made by a starter check, bank courtesy check, money order, instant loan check, credit card check, traveler's check, foreign check not in U.S. dollars, check dated over 180 days, postdated check, check with unclear instructions, or any other check the plan deems unacceptable.

\$
Amount

- B. **Indirect rollover from another qualified 529 plan, an education savings account (ESA), or a qualified U.S. savings bond.**
- **Indirect rollover from another qualified 529 plan or an ESA.** Enclose documentation from the distributing financial institution detailing a breakdown of contributions and earnings.
 - **Indirect rollover from a qualified U.S. savings bond.** Attach a statement or IRS Form 1099-INT issued by the distributing financial institution that shows the interest paid upon redemption.

If you do not provide the necessary documentation, the entire amount will be considered earnings, which could result in adverse tax consequences, particularly if you later make a nonqualified withdrawal from your Direct Portfolio account.

\$
Contributions

\$
Earnings

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CO ADDITIONAL PURCHASE