

CollegeBound 529

Additional Contribution Form

- Forms can be downloaded from our website at **www.collegebound529.com**, or you can call us to order any form—or request assistance in completing this form—at **1.877.615.4116** any business day from 8 a.m. to 8 p.m. Eastern time.

CollegeBound 529
95 Wells Ave, Suite 155
Newton, MA 02459

Name of Beneficiary (first, middle initial, last)



2. Contribution Method

Source of funds (Check all that apply.)

A. ☐ **Personal check.**

Important: All checks must be payable to CollegeBound 529.

\$, .

Amount

B. ☐ Rollover from another 529 plan, Education Savings Account (ESA), or Qualified U.S. Savings Bond to a CollegeBound 529 Account. Complete and include an **Incoming Rollover Form**, available online at **www.collegebound529.com** or by calling **1.877.615.4116**. By law, rollovers between 529 plans with the same Beneficiary are permitted only once every 12 months.

\$, .

Amount

C. ☐ Indirect Rollover. A check is included from another 529 plan, ESA, or Qualified U.S. Savings Bond that was redeemed within the last 60 days. You must provide an account statement from your former account or IRS form 1099-INT or 1099Q, when available, showing the contribution and earnings portion of the redemption. If these forms are not provided, the entire amount will be treated as earnings.

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Amount of Rollover

\$, .

Principal (Basis)

\$, .

Earnings

