CollegeChoice Advisor 529 Savings Plan

# Additional Contribution Form

CollegeChoice**Advisor**
529 SAVINGS PLAN

- Complete this form to make additional contributions to your CollegeChoice Advisor Account by check or rollover.
- For your contribution to be invested, you must clearly print all required information and include a check payable to **CollegeChoice Advisor 529 Savings Plan** for an amount matching the amount below.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address below. Do not staple.

**Note:** Your contribution will be invested according to the standing allocation instructions on file for your Account at the time this form is received in good order.

Forms can be downloaded from our website at **www.collegechoiceadvisor529.com**, or you can call us to order any form — or request assistance in completing this form — at **1.866.485.9413** any business day from 8 a.m. to 8 p.m. Eastern time.

Mail this form and any other required documents to:
**CollegeChoice Advisor 529 Savings Plan**
**P.O. Box 219354**
**Kansas City, MO 64121**

For overnight delivery or registered mail, send to:
**CollegeChoice Advisor 529 Savings Plan**
**920 Main Street, Suite 900**
**Kansas City, MO 64105**

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Account Number *(Include your Account number on your check.)*

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

Name of Beneficiary *(first, middle initial, last)*

**Source of Funds.** *(Your additional contributions must be at least $25.)*

A. ☐ **Personal check**. **Important:** All checks must be made payable to **CollegeChoice Advisor 529 Savings Plan.**

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Amount

B. ☐ **Indirect rollover from another qualified 529 plan, an Education Savings Account (ESA), or 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 qualified U.S. savings bonds** — Please attach a statement or IRS Form 1099-INT issued by the distributing financial institution that shows the interest paid upon redemption.

**Important:** If you do not provide this documentation, the entire amount will be considered earnings, which could result in adverse tax consequences, particularly if you later make a non-qualified distribution from your CollegeChoice Advisor Account.

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Contributions

**$** ☐☐☐,☐☐☐.☐☐
Earnings

* I N  A D V  A D D L  C O N T R I B *