Indiana529 Direct Savings Plan

Payroll Deduction Form

Indiana529 **Direct** Savings Plan

- Complete this form to start, change, or stop payroll deduction instructions on your existing Indiana529 Direct Savings Plan (Indiana529) Account(s). You may also provide your payroll deduction instructions when you log on to our website at **www.indiana529direct.com**. *(If you have not established an Account, you must also complete and enclose an **Enrollment Form**.)*
- After we process this form, you will receive a **Payroll Deduction Confirmation Form**, which you must sign and submit to your employer's payroll department. Your payroll deduction instructions will not take effect until your employer has accepted your signed form.
- 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.

Forms can be downloaded from our website at **www.indiana529direct.com**, or you can call us to order any form—or request assistance in completing this form—at **1.866.485.9415** any business day from 8 a.m. to 8 p.m. Eastern Time. Terms used in this form not otherwise defined, have the same meaning as those terms used in the Indiana529 Direct Savings Plan Disclosure Booklet (Disclosure Booklet).

Return this form and any other required documents to:

Indiana529 Direct Savings Plan
P.O. Box 219418
Kansas City, MO 64121

For overnight delivery or registered mail, send to:

Indiana529 Direct Savings Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

1. Account Owner information

☐☐☐☐☐☐☐☐☐☐ – ☐☐
Account Number

☐☐☐ – ☐☐ – ☐☐☐☐
Social Security Number or Taxpayer Identification Number ***(Required)***

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

☐☐☐ – ☐☐☐ – ☐☐☐☐
Telephone Number (In case we have a question about your Account.)

2. Employer information

Name of Employer

Address

City | State | Zip Code

Payroll Department Contact Name | Telephone Number | Extension *(if any)*

* I N D I R P A Y R O L L *

3. Payroll deduction instructions

Check one: ☐ Start Payroll Deductions ☐ Change Amount ☐ Stop Payroll Deductions *(Skip to **Section 4**)*

Deduct $ ☐☐☐☐.0 0 from my paycheck each pay period and allocate the amount among my Indiana529 Accounts as detailed below.

Important: You must allocate a minimum of $10 to each Account per pay period. Please use an additional sheet if you have more than four Accounts.

☐☐☐☐☐☐☐☐☐ – ☐☐ $ ☐,☐☐☐.0 0

Account Number Dollar Amount

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

☐☐☐☐☐☐☐☐☐ – ☐☐ $ ☐,☐☐☐.0 0

Account Number Dollar Amount

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

☐☐☐☐☐☐☐☐☐ – ☐☐ $ ☐,☐☐☐.0 0

Account Number Dollar Amount

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

☐☐☐☐☐☐☐☐☐ – ☐☐ $ ☐,☐☐☐.0 0

Account Number Dollar Amount

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

4. Signature — YOU MUST SIGN BELOW

I certify that I have read and understand, consent, and agree to all the terms and conditions of the Disclosure Booklet and understand the rules and regulations governing Indiana529.

SIGNATURE

Signature of Account Owner

☐☐ – ☐☐ – ☐☐☐☐

Date *(mm/dd/yyyy)*