Learning Quest Advisor

Additional Contribution Form

LearningQuest®
529 EDUCATION SAVINGS PROGRAM

- Complete this form to make additional contributions to your Learning Quest 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 **Learning Quest Advisor** 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.

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.

Return this form and any other required documents to:

Learning Quest Advisor
P.O. Box 2947
Shawnee Mission, KS 66201-1347

Forms can be downloaded from our website at **learningquest.com,** or you can call us to order any form — or request assistance in completing this form — at **1-877-882-6236**.

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

Name of Account Owner/Responsible Individual/Custodian *(first, middle initial, last)* or Entity

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

Source of Funds.

A. ☐ **Personal check. Important:** All checks must be made payable to **Learning Quest Advisor.**

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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 bond** — 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 withdrawal from your Learning Quest Advisor Account.

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Contributions

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Earnings

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