DO NOT STAPLE

College SAVE Plan

Additional Purchase Form

College SAVE™

Bank of North Dakota's 529 Plan

- Print clearly, preferably in capital letters and black ink.
- Complete this form to make additional contributions to your account by check.
- For your contribution to be invested, you must clearly print all required information and include a check payable to College SAVE for an amount matching the amount below. Otherwise, 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 at the time this form is received in good order.

Forms can be downloaded from our website at **www.collegesave4u.com**, or you can call us to order any form – or request assistance in completing this form at **1.866.SAVE.529 (866.728.3529)** any business day from 8 a.m. to 8 p.m. ET.

Return this form to:
College SAVE
P.O. Box 219781
Kansas City, MO 64121-9781

For overnight delivery or registered mail, send to:
College SAVE
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

Account Number (Include your account number on your check or money order.)

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

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

Source of Funds. Your subsequent contributions must be at least $25.

A. ☐ **Personal check. Important:** *All checks must be payable to College SAVE.*

$ ___,___.__
Amount

B. ☐ **Indirect rollover from a qualified 529 plan, an education savings account (ESA), 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 College SAVE account.

$ ___,___.__
Contributions

$ ___,___.__
Earnings

ND ADD PURCH

ASCENSUS