

DO NOT STAPLE

New York's 529 College Savings Program *Direct Plan*
Additional Purchase Form



- Complete this form to make additional contributions to your account by check.
- If you want to make an additional contribution by direct rollover from another 529 plan, complete an Incoming Rollover Form, which is available online at **www.nysaves.org** or by calling **877-NYSAVES** (877-697-2837).
- For your contribution to be invested, you must clearly print all required information and include a check made payable to: *New York's 529 College Savings Program Direct Plan*. Make sure to include your account number on your check. If you don't include the required information on this form, your investment will be delayed until the 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.
- **Federal law** allows distributions of up to \$10,000 per beneficiary per year for tuition expenses in connection with enrollment or attendance at an elementary or secondary public, private, or religious school (K–12 Tuition Expenses) with no resulting federal taxes or penalties.
New York State taxpayers should not take a State income tax deduction on contributions if funds will be used for K–12 Tuition Expenses. Under **New York State law**, distributions for K–12 Tuition Expenses will be considered nonqualified withdrawals and will require the **recapture of that State income tax deduction.**
- The Investment Options offered through the NY 529 Plan are designed to help you save for post-secondary higher-education expenses. Please see the Disclosure Booklet and Tuition Savings Agreement for additional information.
- Print clearly, preferably in capital letters and black ink.

Forms can be downloaded from our website at **www.nysaves.org**. Or you can call us toll-free to order any form—or get assistance in filling out this one—at **877-NYSAVES** (877-697-2837) on business days from 8 a.m. to 9 p.m., Eastern time. Return this form along with a check and any other required documents in the enclosed postage-paid envelope, or mail to: **New York's 529 College Savings Program Direct Plan, P.O. Box 55440, Boston, MA 02205-8323**. For overnight delivery or registered mail, send to: **New York's 529 College Savings Program Direct Plan, 95 Wells Avenue, Suite 155, Newton, MA 02459-3204**.

(Include your account number on each enclosed check.)
 Account Number

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

Name of Beneficiary (first, middle initial, last)

Source of Funds (Check all that apply.)

Contributions and rollovers by check may not be collected for seven business days.

A. **Check.** Make your check payable to *New York's 529 College Savings Program Direct Plan*.

\$
 Amount



B. **Indirect rollover from another qualified 529 plan, an education savings account (ESA), or a 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 a qualified U.S. savings bond.** Attach a statement or IRS Form 1099-INT issued by the distributing financial institution that shows the interest paid upon redemption.

If you do not provide this documentation and you make a nonqualified withdrawal in the future, the entire amount will be considered taxable earnings.

\$
Contributions

\$
Earnings