

## CollegeBound Saver

CollegeBound Saver  
Additional Contribution Form

- Use this form to make additional contributions to your CollegeBound Saver Account by check or rollover.
- For your contribution to be invested, you must clearly print all required information and include a check payable to **CollegeBound Saver** 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 listed. 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.collegeboundsaver.com](http://www.collegeboundsaver.com), or you can call us to order any form—or request assistance in completing this form—at **1.877.517.4829** any business day from 8 a.m. to 8 p.m. Eastern time.

**1.877.517.4829**

8 a.m. to 8 p.m. Eastern Time M-F

[www.collegeboundsaver.com](http://www.collegeboundsaver.com)

Regular mailing address:

**CollegeBound Saver  
P.O. Box 55986  
Boston, MA 02205-9714**

Overnight mailing address:

**CollegeBound Saver  
95 Wells Ave, Suite 155  
Newton, MA 02459-3204****1. Account information** — 

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

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

Name of Beneficiary (first, middle initial, last)

**2. Contribution Method****Source of Funds.**

- A.  **Personal check. Important:** All checks must be made payable to **CollegeBound Saver**.

\$ ,.

Amount

- B.  **Rollover from another 529 plan, Education Savings Account (ESA), or Qualified U.S. Savings Bond to a CollegeBound Saver Account.** Complete and include an **Incoming Rollover form**, available online at [www.collegeboundsaver.com](http://www.collegeboundsaver.com) or by calling **1.877.517.4829**. By law, rollovers between 529 plans with the same Beneficiary are permitted only once every 12 months.

\$ ,.

Amount

- C.  **Indirect Rollover.** A check is included from another 529 plan, ESA, or Qualified U.S. Savings Bond that was redeemed within the last 60 days. You must provide an account statement from your former Account or IRS form 1099-INT or 1099Q showing the contribution and earnings portion of the redemption. If these forms are not provided, the entire amount will be treated as earnings.

\$ ,.

Amount of Rollover

\$ ,.

Principal (Basis)

\$ ,.

Earnings

\* R I D I R E C T   A D D   C O N T R I B \*  
**1**



State of Rhode Island  
Office of the General Treasurer  
Seth Magaziner

