CollegeBound Saver

CollegeBound Saver Additional Contribution Form

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

www.collegeboundsaver.com

1.877.517.4829

Regular mailing address:

Boston, MA 02205-9714

Overnight mailing address:

95 Wells Ave, Suite 155 Newton, MA 02459-3204

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P.O. Box 55986

- 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**, 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.

Account information



Recount Number Include your recount number on your check.

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

Name of Beneficiary (first, middle initial, last)

Contribution Method

Source of Funds.

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



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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 or by calling 1.877.517.4829. By law, rollovers between 529 plans with the same Beneficiary are permitted only once every 12 months.

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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.

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Amount of Rollover	Principal (Basis)	Earnings					

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DO NOT STAPLE



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