Edvest College Savings Plan

Additional Contribution

EDVEST 529

Your Partner in Saving for Higher Education

- Use this form to make additional contributions to your Edvest College Savings Plan Account by check or rollover.
- For your contribution to be invested, you must print clearly all required information and include a check payable to **Edvest** 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.
- For faster processing, you can complete this request online at **Edvest.com.**

Note: Your contribution will be invested according to the Allocations for Future Contributions at the time this form is received in good order.

To request assistance in completing this form call us at **1.888.338.3789**, Monday through Friday from 7 a.m. – 9 p.m. CT.

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www.Edvest.com

Regular mailing address:
Edvest College Savings Plan
P.O. Box 219437
Kansas City, MO 64121-9437

Overnight mailing address:
Edvest College Savings Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

1. Account Information

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

Account Owner *(First name)* *(M.I.)*

Account Owner *(Last name)*

Beneficiary *(First name)* *(M.I.)*

Beneficiary *(Last name)*

WI ADDITIONAL CONTRIBUTIONS

2. Contribution Method

Source of funds *(Check all that apply.)*

A. ☐ **Check.** Make check payable to **Edvest.**
Include your check with this **Additional Contribution Form**. Personal checks (excluding starter checks), bank drafts, teller's checks, cashier's checks, checks issued by a financial institution or brokerage firm payable to you and endorsed over to the Plan by you, and third-party personal checks up to $10,000 endorsed over to the Plan are accepted.

$ ☐☐☐,☐☐☐.☐☐
Amount

B. ☐ **Indirect Rollover.** A check is included from another 529 plan, Coverdell Education Savings Plan, or 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 1099-Q showing the contribution and earnings portion of the redemption. If these forms are not provided, the entire amount will be treated as earnings. By law, rollovers between 529 plans with the same Beneficiary are permitted only once every 12 months.

$ ☐☐☐,☐☐☐.☐☐ Amount of Rollover

$ ☐☐☐,☐☐☐.☐☐ Principal *(Basis)*

$ ☐☐☐,☐☐☐.☐☐ Earnings

Note: Contributions will be rejected and returned to the extent that they cause the aggregate market value of all accounts in the Plan for the same Beneficiary to exceed the Maximum Contribution Limit. Please refer to the Plan Description for more information.

A note about Uniform Gift to Minors/Uniform Transfers to Minors Accounts (UGMA/UTMA): If your contribution check represents proceeds from an UGMA/UTMA account, those funds can only be deposited into another UGMA/UTMA account for the same Beneficiary, subject to applicable law governing such accounts.

TIAA-CREF Tuition Financing, Inc., Plan Manager. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the Edvest College Savings Plan.