Independent 529 Plan
GUARANTEED TUITION at AMERICA'S PRIVATE COLLEGES

Independent 529 Plan
Additional Contribution by Mail

Use this form to contribute to an existing Plan Account
Questions? Toll-free 1-888-718-7878
P.O. Box 55191, Boston, MA 02205-8217
Visit www.independent529plan.org

Instructions

- Use this *Additional Contribution by Mail* form only to contribute to an existing Plan Account. (You must complete an *Account Application* to open an Account for another Account Owner and/or Beneficiary.)
- A separate *Additional Contribution by Mail* form is required for each Account. You can obtain additional copies of this form, or any Plan form, by calling the Plan or by visiting *www.independent529plan.org.*
- Print in capital letters using blue or black ink. Mail this form to the Plan at the above address, along with your contribution check(s).

1 Account Information *(Refer to your Account statement.)*

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Plan Account Number (Refer to your statement.)

Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name

Beneficiary Name (First, MI, Last, Suffix)

2 Contribution Check Information *(Check one or both, if applicable.)*

Make check(s) payable to the *Independent 529 Plan.*

Contributions are permitted by personal checks (excluding starter checks), bank drafts, teller's checks and checks issued by a financial institution or brokerage account payable to the Account Owner and endorsed to the Plan by the Account Owner, and third-party personal checks up to $10,000 endorsed to the Plan by the Account Owner. Checks must be drawn on a U.S. banking institution and must be payable in U.S. dollars.

The Maximum Account Balance Limit is $177,500 per Beneficiary.

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.

☐ **Regular Contribution Check(s)**

☐ **Rollovers Check(s) under I.R.C. § 529** If you have already received a check from another Qualified Tuition Program or from a Coverdell Education Savings Account (Education IRA), the Plan must receive your contribution check within 60 days of the date of withdrawal from the other program to qualify for rollover treatment. You must also provide a breakdown of the contributions and earnings from your former account.

Your rollover check may be endorsed to the *Independent 529 Plan*, regardless of amount, if the check issued by your former account is payable to you. You can also submit a personal check for the amount you received as a rollover from the former account. Unless the Plan receives a statement, including a breakdown of earnings and contributions for your original account, the entire rollover amount will be treated as earnings and will be reported as earnings upon a refund withdrawal.

3 Contribution Amount *(Minimum $25)*

List each check amount in this section and refer to the *Disclosure Booklet* for complete Plan information.

	Contribution Amount(s)
1.	$, .
2.	$, .
3.	$, .
4.	$, .
Total	$, .

Mail this form to:

Independent 529 Plan
P.O. Box 55191
Boston, MA 02205-8217

TIAA CREF
FINANCIAL SERVICES FOR THE GREATER GOOD™

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