Kentucky Education Savings Plan Trust

Additional Contribution by Mail

Use this form to contribute to an existing Plan Account

Questions? Call toll-free 1-877-598-7878
P.O. Box 8100, Boston, MA 02266-8100
Visit www.kysaves.com

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.kysaves.com.*
- 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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Fund and Plan Account Number (Provide any one from 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 checks payable to, or appropriately endorse to, the **Kentucky Education Savings Plan Trust.**

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 $235,000 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.

☐ **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.

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 withdrawal.

3 Investment Option Information *(You must complete this section or your contribution will be rejected.)*

You may direct your contribution to an existing Investment Option or into a new Investment Option, which will be opened upon receipt of this contribution. The minimum contribution is $25 per Investment Option. See the *Disclosure Booklet* for more information.

Investment Options	Is this a new investment option?	Contribution Amount(s) *(Minimum $25 per option)*
Managed Allocation Option	☐ Yes OR ☐ No	$, .
Active Equity Option (1970)	☐ Yes OR ☐ No	$, .
Equity Index Option (1969)	☐ Yes OR ☐ No	$, .
Balanced Option (2006)	☐ Yes OR ☐ No	$, .
Fixed Income Option (1971)	☐ Yes OR ☐ No	$, .
Guaranteed Option (1819)	☐ Yes OR ☐ No	$, .
Total Contribution Check(s)		$, .

Mail this form to:

Kentucky Education Savings Plan Trust
P.O. Box 8100
Boston, MA 02206-8100

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