

# Additional Purchase by Mail

## | Instructions

**Print clearly in all CAPITAL LETTERS using blue or black ink.**

When requested, please color in circles completely.

Please use this form to make a non-electronic purchase to an existing Private College 529 Plan<sup>SM</sup> account. A separate form is required for each account. You must complete an Enrollment Form to open a new account. To enroll online, visit [privatecollege529.com](http://privatecollege529.com).

If you have any questions, please call us at **1.888.718.7878** Monday through Friday from 9:00am to 8:00pm, ET

Please mail the completed form to the following address:

**Private College 529 Plan  
P.O. Box 5268  
Denver, CO 80217**

## 1 | Purchase Information

Account number	Social Security or Taxpayer ID number	
Account Owner's first name	Middle initial	Last name
Beneficiary's first name	Middle initial	Last name
Beneficiary's Social Security or Taxpayer ID number		

## 2 | Contribution Check Information

If your purchase check represents proceeds from an UGMA/UTMA account, be advised that those funds can only be deposited into another UGMA/UTMA account for the same Beneficiary, subject to applicable law governing such accounts.

**Make check(s) payable to "Private College 529 Plan."**

Checks must be drawn on a U.S. banking institution and must be payable in U.S. dollars. Third-party checks are subject to review. We do not accept money orders.

**Please color in one or both circles if applicable**

- Personal Check(s)
- Rollover Check(s)

If you have received a check from another Section 529 Plan or from a Coverdell Education Savings Account (Educational IRA), Private College 529 Plan must receive your check within 60 days of the date of withdrawal from the other program to qualify for rollover treatment.

The rollover check issued by your former account may be endorsed to Private College 529 Plan, as long as that check is payable to you. You can also submit a personal check for the amount you received as a rollover from the former account.



2 | Contribution Check Information (continued)

Indicate which portion of the Rollover is attributable to contributions (cost basis), and which is attributable to earnings. Otherwise, your entire Rollover is required to be treated as earnings which may be taxable upon withdrawal.

For further details, please call your Program Manager.

\$ \_\_\_\_\_ Total Amount of Rollover

\$ \_\_\_\_\_ Base Contribution or Cost Basis of Rollover

\$ \_\_\_\_\_ Earnings Portion of Rollover

3 | Purchase Amount

Minimum purchase amount is \$25.

List each check amount in this section if you are depositing more than one check.

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_

\_\_\_\_\_  
TOTAL PURCHASE

Private College 529 Plan<sup>SM</sup> is established and maintained by Tuition Plan Consortium, LLC. OFI Private Investments Inc., a subsidiary of OppenheimerFunds, Inc., is the program manager. Participation in the Plan does not guarantee admission to any college or university, nor does it affect the admissions process. Tuition Certificates are not insured or guaranteed by the FDIC, TPC, any governmental agency or OFI Private Investments Inc. or its affiliates.

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