



# Manage Monthly Contributions Form

## Important information about this form:

- Fill out this form to setup, remove, or replace recurring monthly contributions to your Oregon College Savings Plan account.
- You must have an open account to use this form. If you need to sign up, go online to [www.OregonCollegeSavings.com](http://www.OregonCollegeSavings.com) or use an **Enrollment Form** before completing this form.
- Make sure you use black ink. Type or print clearly in capital letters.

## Need help?

Give us a call Monday – Friday  
from 6am – 5pm PT at  
**1-866-772-8464** or  
**1-844-888-2253 (TTY)**

## Mail the form to:

Oregon College Savings Plan  
P.O. Box 9651  
Providence, RI 02940-9651

## Overnight Mail:

Oregon College Savings Plan  
4400 Computer Drive  
Westborough, MA 01581

## Want to do this quicker?

Sign in to create or manage your  
monthly contributions online.

## 1 Oregon College Savings Plan account information

\_\_\_\_\_  
Name of Account Owner (First and last)

\_\_\_\_ \_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Account Owner's Social Security or Taxpayer Identification Number

\_\_\_\_\_  
Oregon College Savings Plan account number

## 2 Instructions

- Stop all monthly contributions to this account (skip to **Step 5**)
- Replace all monthly contributions to this account (complete **Steps 3, 4, and 5**)
- Create a new monthly contribution to this account (complete **Steps 3, 4, and 5**)

You can create, stop or replace individual monthly contributions from your online account.

### 3 Monthly Contribution Setup

Tell us how much you want to contribute to your account each month. There is a \$5 minimum contribution.

Please clearly print the portfolio name, code and amount you'd like to contribute below. Reference the **Portfolio Options Appendix** at the end of this form for a list of all portfolio names and codes.

\_\_\_\_ Code      \_\_\_\_\_ Portfolio name      \$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_ Amount

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\_\_\_\_ Contribution Day (1 – 28)\*      \$ \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_ Total contribution amount

If you don't pick a date, we'll automatically deduct your contribution on the 1st of every month.

**Have more portfolios you want to contribute to?**  
 Sign in online to make additional contributions at [www.OregonCollegeSavings.com](http://www.OregonCollegeSavings.com)

\* A note on when contributions will be deducted from your bank account: If the Contribution Day you've selected falls on a regular business day, your contribution will be deducted from your bank account two business days prior to the Contribution Day. If the Contribution Day you've selected falls on a weekend or a holiday, the contribution will be deducted from your bank account on the next Business Day.

## 4 Bank account information (Optional)

Attach a voided check or copy of your bank statement showing the name, address, last 4 digits of the account number and complete the bank information below. (Please do not staple, use a paper clip for the check).

What type of documentation are you including to verify this bank account?

- Voided check
- Bank statement

Bank account type     Checking     Savings

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### Name on bank account

The Account Owner/Custodian or Beneficiary must own the bank account connected to the Oregon College Savings Plan account.

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### Bank Account Holder Signature

(If different from Oregon College Savings Plan Account Owner/Custodian)

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Bank name

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Bank routing number

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Bank account number

### Need help?

You can find your bank information on the bottom of one of your checks here:

⑆000000000	⑆ 00000000000	⑆ 1000
Routing Number	Account Number	

## 5 Sign the form

By signing this form, you're confirming that the information provided is accurate, and true and that you agree and certify that:

- If I selected Stop all monthly contributions to this account, or Replace all monthly contributions to this account:
  - I understand that all currently active monthly contributions to this account will be cancelled.
  - I understand that my request will become effective once processed by the Plan and that the Plan must receive my request at least 3 business days before I want it to become effective.
- If I selected Create a new monthly contribution to this account, or Replace all monthly contributions to this account:
  - I understand this authorizes the Plan to initiate recurring ACH debits (direct withdrawals) from my bank account up to two business days prior to the Contribution Day each month for the total contribution amount.\*
  - I may cancel these recurring ACH debits (direct withdrawals) by using this form or by cancelling them through my online account.

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Signature of Account Owner/Custodian

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Date (mm/dd/yyyy)

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## Appendix – Oregon College Savings Plan Portfolio Options

For descriptions and details about all of these portfolio options, please go online to [www.OregonCollegeSavings.com](http://www.OregonCollegeSavings.com) or see the **Plan Disclosure Booklet** for important information including descriptions, details, and risks about the investment options before making a decision.

### College Enrollment Year

Code	Portfolio Name
ORC37	Enrollment Year 2037
ORC36	Enrollment Year 2036
ORC35	Enrollment Year 2035
ORC34	Enrollment Year 2034
ORC33	Enrollment Year 2033
ORC32	Enrollment Year 2032
ORC31	Enrollment Year 2031
ORC30	Enrollment Year 2030
ORC29	Enrollment Year 2029
ORC28	Enrollment Year 2028
ORC27	Enrollment Year 2027
ORC26	Enrollment Year 2026
ORC25	Enrollment Year 2025
ORC24	Enrollment Year 2024
ORC23	Enrollment Year 2023
ORC22	Enrollment Year 2022
ORC21	Enrollment Year 2021
ORC20	Enrollment Year 2020
ORC19	Enrollment Year 2019
ORC18	Enrollment Year 2018
ORC17	Enrollment Year 2017
ORC16	Enrollment Year 2016
ORC15	Enrollment Year 2015
ORC14	Enrollment Year 2014
ORC13	Enrollment Year 2013

### Static Portfolios

Code	Portfolio Name
ORCCO	Target Risk – Conservative
ORCMO	Target Risk – Moderate
ORCAG	Target Risk – Aggressive
ORCDU	Diversified U.S. Equity
ORCDI	Diversified International Equity
ORCDF	Diversified Fixed Income
ORCIN	Diversified Inflation Protection
ORCBI	Balanced Index
ORCSC	Social Choice Balanced
ORCSF	Short-Term Fixed Income Index
ORCUE	U.S. Equity Index
ORCIE	International Equity Index
ORCFI	Fixed Income Index
ORCXX	FDIC-Insured Option (replacement for Principle Plus Interest)

The investment information on this page has been provided by Sellwood Consulting, the investment advisor for the Oregon College Savings Plan. Before you make a decision, review the Plan Disclosure Booklet to learn about the important details and risks of each investment option.