

Important information about this form:

- Fill out this form to make a full or partial withdrawal from your Oregon College Savings Plan account.
- We are required to file an IRS Form 1099-QA when you make a withdrawal from your account.
- There's a \$5 minimum withdrawal for each portfolio.
- You can withdraw up to 90% of the total amount in a portfolio or the full amount. The minimum balance for each portfolio is \$5 unless you decide to withdraw the full amount.
- You must wait 10 days before you can withdraw a contribution made by bank ACH or check.
- Withdrawals may have tax consequences depending on how the distribution is used. You should consult your tax advisor.
- Keep all of your receipts for qualified education expenses for tax purposes.
- If you recently changed your bank account information or address on file, you must wait 30 days before you can make a withdrawal, unless you provide a Medallion Signature Guarantee (**Step 7**).
- A Medallion Signature Guarantee is required: (i) for withdrawal requests of \$100,000 or more; (ii) for an Entity Account or an Account for which the individual completing the form is acting in a legal capacity as a representative of the Account Owner or (iii) if the address on the account has been changed (**Step 7**).
- Use black ink to type or print clearly, and do not staple the sheets together.

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

1 Oregon College Savings Plan account information

Name of Account Owner (First and last)

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

OS ____ _
Oregon College Savings Plan account number (for account numbers
less than 11-digits, please use leading zeros)

2 Withdrawal amount

Choose the portfolio(s) you want to withdraw money from. There's a \$5 minimum withdrawal per portfolio and you must have at least \$5 in a portfolio to keep it open. You can withdraw up to 90% of the total amount or the full amount.

For a full list of all the portfolio options and for important information about the investment options please see the **Plan Disclosure Booklet** before making a decision.

You must wait 10 days before you can withdraw a contribution made by bank ACH or check contribution.

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

Code	Portfolio name	\$ _____ , _____ . _____
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	Amount

Code	Portfolio name	\$ _____ , _____ . _____
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	Amount

Code	Portfolio name	\$ _____ , _____ . _____
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	Amount

Code	Portfolio name	\$ _____ , _____ . _____
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	Amount

Want to withdraw all funds?

<input type="radio"/> Yes, withdraw the full balance of all portfolios I'm invested in.	\$ _____ , _____ . _____
<input type="radio"/> Close this account Only check this if you want to close your account once all funds are withdrawn.	Total withdrawal amount

Have more portfolios you want to withdraw from?
 Sign in online to make additional withdrawals at www.OregonCollegeSavings.com

3 Payee information

- Account Owner/Custodian
This will be the tax responsible party who will receive the 1099Q form.

How do you want this money delivered?

Check (Continue to **Step 6**, \$2.50 fee)

Bank account (Continue to **Step 4**)

- Beneficiary
This will be the tax responsible party who will receive the 1099Q form.

How do you want this money delivered?

Check (Continue to **Step 6**, \$2.50 fee)

Bank account (Continue to **Step 4**)

- Check to eligible Educational Institution or School (Continue to **Step 5**)
The Beneficiary will be the tax responsible party who will receive the 1099Q form.

* If the address for this individual (where the check will be mailed) has changed in the last 30 days you'll need to get a Medallion Signature Guarantee in **Step 7**.

4 Bank account information

Only fill out this information if you are making a withdrawal to a bank account connected to your account.

If the information for this bank account has been changed in the last 30 days, you'll need to get a Medallion Signature Guarantee in **Step 7**.

Name on bank account

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

Bank Account Holder Signature

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

Bank account type Checking Savings

Bank name

Bank routing number

Bank account number

Need help?

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

⑆000000000	⑆	00000000000	⑆ 1000
Routing		Account	
Number		Number	

5 Eligible Educational Institution or School information

Only fill this information out if you are making a withdrawal to an eligible educational institution.

Please confirm the mailing instructions with your school before submitting this form for payment and provide a student ID, if required by the school.

Eligible Educational Institution or School name

Student name, ID or other identifying information (Will only appear on the check)

Institution or School mailing address 1

Institution or School mailing address 2

City

State

ZIP Code

6 Sign the form

By signing below, I certify that the information contained in this form is true, complete and correct. I authorize a withdrawal from my account based on this information. I have received the **Plan Disclosure Booklet** with respect to tax consequences of such a withdrawal and my record keeping obligations, and understand and agree to all terms as presented here and in the **Plan Disclosure Booklet**.

If I am making contributions by payroll deduction, I understand that my payroll contributions will continue into this Account, regardless of the amount withdrawn, unless I notify my employer to stop my payroll deduction, or I submit an updated **Payroll Deduction Form** to reallocate payroll contributions among my other Account(s), if any.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner. If I am an individual acting in a legal capacity as a representative of the Account Owner, or an Entity Account Owner, a Medallion Signature Guarantee appears below.

Signature of Account Owner/Custodian/Authorized Representative
of Entity

Date (mm/dd/yyyy)

7 A Medallion Signature Guarantee

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You can get a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public doesn't qualify, and you cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the Oregon College Savings Plan account.
- **Only sign if you are in the presence of an authorized officer providing the Medallion Signature Guarantee.**

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the **Plan Disclosure Booklet**.

Signature of Account Owner/Custodian/Authorized Representative of Entity

Signature Guarantor

Title

Name of Institution

Date (mm/dd/yyyy)

Have the Authorized Officer stamp here

Appendix – Oregon College Savings Plan Portfolio Options

For descriptions and details about all of these portfolio options, please go online to 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)
ORCPI	Principal Plus Interest (You may only withdraw money from this portfolio, no money may be added to this portfolio.)

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.