



Oregon College Savings Plan Additional Contribution by Mail

Use this form to contribute to an existing Plan Account
Questions? Call toll-free 1.866.772.8464
 P.O. Box 55914, Boston, MA 02205-5914
 Visit OregonCollegeSavings.com

Important Information

- 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.)
- 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 (Please complete one form for each Account)

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Telephone Number

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

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Beneficiary Name (First, MI, Last, Suffix)

2 Contribution Check Information

Make checks payable to, or appropriately endorse to, the Oregon College Savings Plan.

Contributions are permitted by personal 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. Contributions will be rejected and returned to the extent that they cause the aggregate market value of all accounts in the Network for the same Beneficiary to exceed the Maximum Contribution Limit. Please refer to the *Disclosure Booklet* for more information.

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.

Check

Indicate the amount of your contribution into the selected Investment Portfolio(s) below and enclose your contribution check(s), payable to the *Oregon College Savings Plan*, along with this *Additional Contribution Form*.

Indirect Rollover

To roll over the proceeds from the redemption of another Qualified Tuition Plan account (QTP), indicate the amount you are contributing into the Investment Portfolios in Section 4, and submit a check for the amount along with this form. The check must be received within 60 days of the date you received the withdrawal proceeds from the QTP account. *Provide the breakdown of cost basis and earnings in the box below and submit a statement from your former qualified tuition program with these amounts along with this form.*

Proceeds from the withdrawal of a Coverdell Education Savings Account (Coverdell ESA)

Indicate the amount you are remitting from your Coverdell Education Savings Account (Coverdell ESA) into the selected Investment Portfolio(s) below, and submit your check for the amount with this form. *Provide the breakdown of cost basis and earnings below and submit an account statement with these amounts along with your check and this form.*

Proceeds from the redemption of a qualified U.S. savings bond

Indicate the amount you are remitting from the redemption of your qualified U.S. savings bond into the selected Investment Portfolio(s) below and submit your check for the amount with this form. *Provide the breakdown of cost basis and earnings below and submit a Form 1099 with these amounts along with your check and this form.*

Cost Basis	\$									
Earnings	\$									
Total Indirect Rollover Amount	\$									

Note: Unless the Plan receives an account statement (or Form 1099 – INT for proceeds from a qualified U.S. savings bond), including a breakdown of cost basis and earnings or interest for your QTP rollover, Coverdell ESA account withdrawal, or qualified U.S. savings bond redemption, as applicable, the entire amount will be treated as earnings and will be reported to the IRS as earnings upon withdrawal.

3 Contribution Instructions (You must complete this section or your contribution will be rejected).

- Deposit my check(s) based on my current allocation instructions on file.** (Do not provide instructions in Section 4).
- Override Allocation Instructions.** (By selecting override, this contribution will be based on the allocation instructions you provide in Section 4). This will NOT affect your existing allocations (if any) currently on file.

4 Select Investment Portfolios

This will not replace current allocations instructions (if any) currently on file. You can change your Allocation Instructions online, by telephone or by completing the applicable Oregon College Savings Plan Form at any time.

Investment Portfolio Name	Check if new Investment Portfolio ¹	Contribution Amount(s) <i>(Minimum \$25 per Portfolio)</i>																		
Age-Based Portfolio	<input type="checkbox"/> New Portfolio	\$																		
Aggressive Portfolio (2806)	<input type="checkbox"/> New Portfolio	\$																		
Moderate Portfolio (2807)	<input type="checkbox"/> New Portfolio	\$																		
Conservative Portfolio (2808)	<input type="checkbox"/> New Portfolio	\$																		
Diversified US Equity Portfolio (2811)	<input type="checkbox"/> New Portfolio	\$																		
Diversified International Equity Portfolio (2816)	<input type="checkbox"/> New Portfolio	\$																		
Diversified Fixed Income Portfolio (2818)	<input type="checkbox"/> New Portfolio	\$																		
Balanced Index Portfolio (2813)	<input type="checkbox"/> New Portfolio	\$																		
US Equity Index Portfolio (2812)	<input type="checkbox"/> New Portfolio	\$																		
International Equity Index Portfolio (2815)	<input type="checkbox"/> New Portfolio	\$																		
Social Choice Portfolio (2819)	<input type="checkbox"/> New Portfolio	\$																		
Diversified Inflation Protection Portfolio (2817)	<input type="checkbox"/> New Portfolio	\$																		
Fixed Income Index Portfolio (2814)	<input type="checkbox"/> New Portfolio	\$																		
Money Market Portfolio (2810)	<input type="checkbox"/> New Portfolio	\$																		
Principal Plus Interest (2809)	<input type="checkbox"/> New Portfolio	\$																		
Total Contribution Check(s)		\$																		

Note: If you allocate your contributions to the Principal Plus Interest Portfolio, transfers made at a later date from the Principal Plus Interest Portfolio to the Money Market Portfolio will not be permitted.

Mail this form to:
 Oregon College Savings Plan
 PO Box 55914
 Boston, MA 02205-5914

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¹ If a new Investment Portfolio is opened, a different portfolio number will be assigned and new investment coupons will accompany your confirmation statement. You can also use the Additional Contribution by Mail form to contribute by check at any time.