



Oregon College Savings Plan Withdrawal Request Form

Use this form to withdraw funds from the Plan
Questions? Call toll-free 1.866.772.8464
 P.O. Box 55914, Boston, MA 02205-5914
 Visit OregonCollegeSavings.com

Instructions

- Complete a separate form for each type of withdrawal for each designated payee and/or for each Beneficiary.
- Print in capital letters with blue or black ink, sign and date the form, then mail it to the Plan at the above address.
- A Medallion Signature Guarantee is required in Section 5: (i) for withdrawal requests of \$100,000 or more; (ii) for certain Entity Accounts excluding most Accounts owned by a trust, 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) or if, within the past 30 days, the address on the account has been changed, the bank account information was added or changed, or the Account was transferred to a new Account Owner.¹

TREATMENT OF ELEMENTARY AND SECONDARY EDUCATION TUITION COSTS

Effective January 1, 2018, distributions for tuition in connection with enrollment or attendance at an elementary or secondary public, private, or religious school are federal income tax free up to a maximum of \$10,000 of distributions for such tuition expenses per taxable year per Beneficiary from all 529 Plans. State tax consequences based on your state of residence or tax filing may apply. Please see the Plan Disclosure Booklet for more information.

1 Account Information

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Account Number (Refer to your statement.)

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Contact Telephone Number

--

Account Owner, Custodian Name, or Entity Name

--

Beneficiary Name

2 Select a Payee

- Account Owner** (This will be the tax responsible party who will receive the 1099Q form).
- Beneficiary** (This will be the tax responsible party who will receive the 1099Q form).
- School – Colleges and Universities only** (The beneficiary will be the tax responsible party who will receive the 1099Q form).

PLEASE NOTE: It generally takes 7-10 business days for the school to receive the check and additional time for processing. If you need it sooner, please contact our telephone representatives at the telephone number above.

3 Withdrawal Information

- This withdrawal is **not** being used for qualified education expenses. This information is being collected on behalf of the Plan and will not affect how your withdrawal will be reported to the Internal Revenue Service. For more information about withdrawals, please refer to the Plan Disclosure Booklet. You should consult with a qualified tax advisor regarding how tax laws may apply to your particular circumstances

Tell us how much to withdraw from this Account. Write a specific amount or "ALL" next to each Investment Option.

Check this box if this is a systematic withdrawal and complete Section 4.
The Investment Portfolio from which a systematic withdrawal is to be made must have a current market value of at least \$1,000 to establish this option and you can only withdraw from one Investment Portfolio.

Investment Portfolio Name (write in the portfolio name(s) from the list)	Indicate a specific amount or write "ALL"					
	\$,			.
	\$,			.
	\$,			.
	\$,			.
Total Withdrawal Amount	\$,			.

¹ A Medallion Signature Guarantee is available from banks or trust companies, savings banks, savings and loan associations or members of a national stock exchange and warrants that the signer is the appropriate person to provide instruction. A notary public **cannot** provide a Medallion Signature Guarantee. Please contact your bank or broker, if needed.

Investment Portfolio Names (Portfolio Number)		
Age-Based Portfolio (age based)	Diversified Intl Equity Portfolio (2816)	Social Choice Portfolio (2819)
Aggressive Portfolio (2806)	Diversified Fixed Income Portfolio (2818)	Diversified Inflation Protection Portfolio (2817)
Moderate Portfolio (2807)	Balanced Index Portfolio (2813)	Fixed Income Index Portfolio (2814)
Conservative Portfolio (2808)	U.S. Equity Index Portfolio (2812)	Money Market Portfolio (2810)
Diversified U.S. Equity Portfolio (2811)	International Equity Index Portfolio (2815)	Principal Plus Interest Portfolio (2809)

Note: Funds cannot be withdrawn until 10 days after the receipt of each contribution. If applicable, a separate payment will be made to the payee designated in Section 2 once the units are available for withdrawal.

4 Systematic Withdrawal Information (Optional)

By completing this section, you authorize the Plan to systematically withdraw funds from your Account and to pay such amounts to the payee indicated in Section 2. These systematic withdrawals will continue until the Investment Portfolio from which the systematic withdrawal is made has insufficient funds to continue making payments or you advise the Plan in writing to stop making such payments.

✓ **Select the frequency of your withdrawals.**

<input type="checkbox"/> Monthly	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Annually
----------------------------------	------------------------------------	-----------------------------------

✓ **Select the month(s) of your withdrawals.**

<input type="checkbox"/> Every Month (or →)	<input type="checkbox"/> Jan.	<input type="checkbox"/> Feb.	<input type="checkbox"/> Mar.
	<input type="checkbox"/> April	<input type="checkbox"/> May	<input type="checkbox"/> June
	<input type="checkbox"/> July	<input type="checkbox"/> Aug.	<input type="checkbox"/> Sep.
	<input type="checkbox"/> Oct.	<input type="checkbox"/> Nov.	<input type="checkbox"/> Dec.

✓ **Select the date(s) of your withdrawals.**

<input type="checkbox"/> 1st	<input type="checkbox"/> 15 th	<input type="checkbox"/> Other _____
------------------------------	---	--------------------------------------

5 Select a Delivery Method

Check this box for expedited delivery of check payment (Optional, \$15 will be deducted from your Account.)

Pay by Check (A check will be mailed to your or your beneficiary's address of record.)

Pay by Electronic Funds Transfer (EFT) (Funds will be received by your or your beneficiary's bank in a few days.)

You may select this option only if your banking information has been on file for at least 30 days and it has been verified by your bank. Before selecting this option, you may call to confirm your bank account information.

- Your bank account will be credited separately for the amount of contributions and earnings, if any, withdrawn from **each** Investment Portfolio. Depending upon the number of Investment Portfolios you own, you could receive multiple deposits into your bank account.
- If you select this method but you do not have a bank account on file or if your banking information has been added or changed within 30 days, a check will be mailed to your address of record.

Pay to Eligible Educational Institution (Colleges or Universities Only) (A check will be mailed to the institution designated below.)

Please confirm the mailing instructions with your school before submitting this form for payment and provide a student ID, if required by the school. **Note:** Payments for qualified expenses for a foreign Eligible Educational Institution will be paid directly to the Account Owner.

Eligible Educational Institution Name (School)

Student Name, ID or other Identifying Information (This information will appear only on the check.)

School Mailing Address (Line 1)

School Mailing Address (Line 2)

School City, State, Zip

6 Signature and Certification *(Sign this section or the transaction cannot be processed.)*

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 understand and agree to all terms as presented here and in the Plan Disclosure Booklet and Participation Agreement.

If I am participating in the Automatic Contribution Plan (ACP), my participation in ACP will be cancelled if I have requested a withdrawal of my entire Account balance (in all Investment Portfolios) but it will continue if I have only requested a partial withdrawal from my Account unless an *Electronic Banking Information Form* accompanies this form.

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.

Reimbursement for elementary or secondary tuition payments may be sent to the Account Owner or Designated Account Beneficiary only.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner. A medallion signature guarantee may be required. Please see Important Information below. If I am withdrawing my entire account balance, I request the cancellation of my *Participation Agreement* and the closure of my Account.

Signature of Account Owner, Custodian or Authorized Representative of an Individual or Entity Account Owner

Date

IMPORTANT INFORMATION

A Medallion Signature Guarantee is required: (i) for all entity Accounts except Accounts owned by a trust so long as the Plan has trust documents on file which include the current names of all trustees, or Accounts for which the individual completing this form is acting in a legal capacity as a representative of the individual Account Owner; or (ii) if the address on the account has been changed, if the Account was transferred to a new Account Owner in the past 30 days or if the bank account has been changed in the past 30 days and the redemption is being sent to the bank of record. A Medallion Signature Guarantee is required for all withdrawal requests of \$100,000 or more. You may be required to provide proof of your authority to act on behalf of this Account to your bank or broker before a Medallion Signature Guarantee will be provided.

Note: A Medallion Signature Guarantee is not required if a *Plan Power of Attorney Form* is on file for an Individual Account, or if a *Plan Power of Attorney Form* accompanies this form **unless** the withdrawal request is \$100,000 or more.

GUARANTOR TO AFFIX STAMP HERE

Mail this form to:

Regular Mail

(If needed, call for overnight mailing address.)

Oregon College Savings Plan

P.O. Box 55914

Boston, MA 02205-5914

A12140:03/18