Oklahoma College Savings Plan
Additional Contribution by Mail

Use this form to contribute to an existing Plan Account
Questions? Call toll-free 1-877-654-7284
P.O. Box 8193, Boston, MA 02266-8193
Visit www.ok4saving.org

Instructions

- Use this *Additional Contribution by Mail* form only to contribute to an existing Plan Account, or make an additional contribution online at *www.ok4saving.org*. (You cannot use this form to open an Account for another Account Owner and/or Beneficiary.)
- A separate *Additional Contribution by Mail* form is required for each Account. You can obtain additional copies of this form, or any Plan form, by calling the Plan or by visiting *www.ok4saving.org* and clicking on *Account Forms*.
- 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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Fund and Plan Account Number (Provide any one from your statement.)

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

Beneficiary Name (First, MI, Last, Suffix)

2 Contribution Check Information *(Check one or both, if applicable.)*

Make checks payable to, or appropriately endorse to, the *Oklahoma 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. The Maximum Account Balance Limit is $300,000 per Beneficiary.

A note about Custodial Accounts under the Uniform Gift to Minors and Uniform Transfers to Minors Acts (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.

Your contribution check may be endorsed to the Plan, regardless of amount, if the check issued by your former account is payable to you as custodian or to the minor. You can also submit a personal check for the amount you received from the former account.

☐ **Regular Contribution Check(s)**

☐ **Rollovers Contribution Check(s) under I.R.C. § 529**

If you have already received a check from another Qualified Tuition Program or from a Coverdell Education Savings Account, the Plan must receive your contribution check within 60 days of the date of withdrawal from the other program to qualify for rollover treatment. Your rollover check may be endorsed to the *Oklahoma College Savings Plan,* regardless of amount, if the check issued by your former account is payable to you. You can also submit a personal check for the amount you received as a rollover from the former account. Unless the Plan receives a statement, including a breakdown of earnings and contributions for your original account, the entire rollover amount will be treated as earnings and will be reported as earnings upon withdrawal.

3 Investment Option Information *(You must complete this section or your contribution will be rejected.)*

You may direct your contribution to an existing Investment Option or into a new Investment Option, which will be opened upon receipt of this contribution. The minimum initial contribution is $100 per Investment Option and the minimum subsequent contribution is $25 per Investment Option. See the *Disclosure Booklet* for more information.

Investment Options	Is this a new investment option?	Contribution Amount(s)
Managed Allocation Option	☐ Yes OR ☐ No	$, .
Diversified Equity Option (2241)	☐ Yes OR ☐ No	$, .
100% Equity Option (1953)	☐ Yes OR ☐ No	$, .
Balanced Option (2240)	☐ Yes OR ☐ No	$, .
Fixed Income Option (2242)	☐ Yes OR ☐ No	$, .
Guaranteed Option (1954)	☐ Yes OR ☐ No	$, .
Total Contribution Check(s)		$, .

Overnight Mail
Oklahoma College Savings Plan
30 Dan Road
Canton, MA 02021-2809

Mail this form to:
Oklahoma College Savings Plan
P.O. Box 8193
Boston, MA 02266-8193

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